



NEW USER MANUAL

Navigation, the Action List, and Common Document Elements



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Introduction

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

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

Once your implementation process is complete, it is very likely that your institution will implement a single sign-on (SSO) portal for you to log on to the application as you would any other.

If your institution is not using SSO, or if you are logging in to a non-production environment, follow these steps to log in:

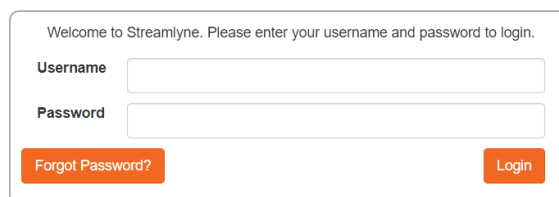
1. Open a browser window.

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

2. Type the URL for your institution's Streamlyne Research website and hit <Enter>.



3. Enter your **Username** and **Password**, and then click the Login button.

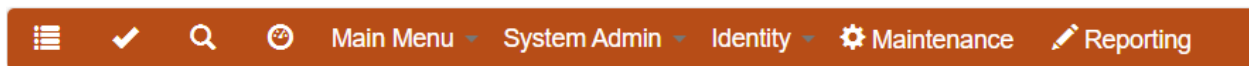
A screenshot of the Streamlyne login interface. At the top, it says "Welcome to Streamlyne. Please enter your username and password to login." Below this are two input fields: "Username" and "Password". At the bottom left is a button labeled "Forgot Password?" and at the bottom right is a button labeled "Login".

Note: If you need to reset your password, you may click the Forgot Password? button to be prompted to reset your password using your recovery email.

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. Due to its importance, we gave the Action List its own section: [Mastering Actions & the Action List](#). The Menu Bar will be discussed first.

The Menu Bar



This Menu Bar is your primary means of navigation in the application. The Menu Bar options will change based on the permissions of the active user; only items that a user has access to will appear. The Menu Bar remains fixed to your primary Streamlyne Research browser tab regardless of where you are in the application.



Click this List button to return to the Portal Page and Action List at any point.



Click this Outbox button to review all items on which you have taken action. Items are moved to the Outbox, once the action has been complete.



Click the Magnifying Glass to access the Document Search function. This is described in the Document Search section below.



Click the Pie Chart icon to access the PD Dashboard, if that functionality is available at your institution.

Click the Main Menu to access various modules within Streamlyne Research, including Proposal Development, Institutional Proposal, Award, IRB, IACUC, and COI.

System Administrators can select System Admin, Identity, or Maintenance to access these technical sections of the application.

Click Reporting to access the Streamlyne Reporting module.

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.

Document Search

Advanced Search Superuser Search Clear Searches Searches ▼

Document Type:  

Initiator:  

Document Id:

Date Created From: 

Date Created To: 

Name this search (optional):

Search Clear Cancel

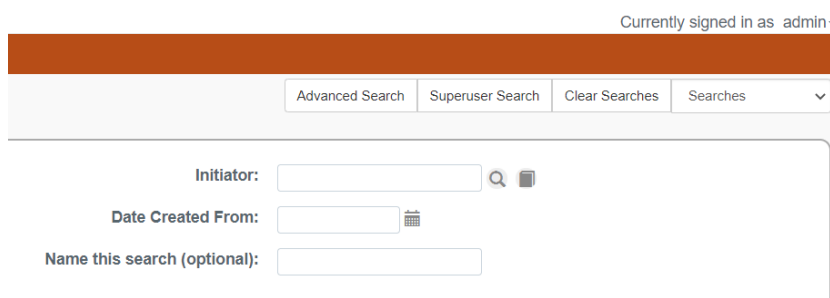
To find any specific document, enter as much information as possible into the search fields, and then click the Search button. Streamlyne Research will display the search results immediately below the window, allowing you to drill into each document by clicking the associated Document Id hyperlink.

Click the Clear button to clear all search fields and start a new search. Click the Cancel button to exit the Document Search.

- Click the magnifying glass adjacent to the Document Type field 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 adjacent to the Initiator field to search for and select the username of the Initiator.
- If you would like to see more information on the Document Type or Initiator that you have selected prior to running the search, click the associated direct inquiry book icon  for further details.
- 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. In other words, this is the 120th Proposal Development document saved to the database, and the 5,469th 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 can be used individually. Enter dates 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 screenshot shows the 'Document Search' interface. At the top right, it says 'Currently signed in as admin'. Below this is a search bar with a dropdown menu labeled 'Searches'. To the left of the search bar are buttons for 'Advanced Search', 'Superuser Search', and 'Clear Searches'. Below the search bar are three input fields: 'Initiator:' with a search icon, 'Date Created From:' with a calendar icon, and 'Name this search (optional):'.

Main Menu

The Main Menu is where all transactional work is completed. The menu option will change based on the permissions of the active 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 options noted below 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.

Main Menu Option	Submenu Option	Description
Pre-Award	Quick Proposal	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 allows for more quick, flexible data entry.
Pre-Award	Institutional Proposals	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 of changes made over time.
Negotiations	Negotiations	Each Negotiation document serves as a record of all activities between parties as specific terms are negotiated. 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	Awards	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	Subawards	A Streamlyne Subaward 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.
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, deviation reporting, online reviews, as well as the generation and tracking of all formal and informal correspondence.

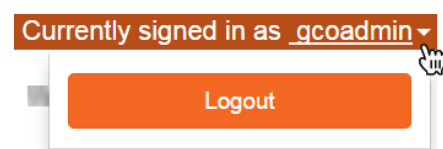
Main Menu Option	Submenu Option	Description
IRB	IRB Committee	The IRB Committee module tracks committee composition over time, to include active members, their roles, and their term history. The IRB Committee module further facilitates committee meeting scheduling, meeting agenda generation and correspondence, 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 Principal Investigator.
IACUC	IACUC Protocol	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	Animals Used to Date	The Animal Use submodule allows high level tracking of animals allocated to specific active IACUC Protocols. As an example, all animal purchases for a particular study are easily logged and recorded in association with a specific protocol.
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 different lookups than a Principal Investigator.
Conflict of Interest	Financial Entities	Each Financial Entity document represents a unique Significant Financial Interest (SFI) or relationship that they may have with an outside organization. The threshold criteria and interview responses collected on this form are fully configurable to comply with federal, state, and institutional policies.

Main Menu Option	Submenu Option	Description
Conflict of Interest	Disclosures	Project-specific Disclosures, Annual Disclosures, Manual (event-based) Disclosures, and Master Disclosures allow users to disclose whether any reported Significant Financial Interests (SFIs) could pose a conflict with their current research projects or institutional responsibilities.
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 different options than a Principal 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	Sponsors	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	Organizations	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.
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 and Action List preferences.

Main Menu Option	Submenu Option	Description
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 <u>delete</u> 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 reports on current and pending support. 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.

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 side of the Hyperlink Bar, and then click the Logout button.

Mastering Actions & the Action List

Each line item on the Action List requires some sort of action from you. All documents (e.g., Proposals, Awards, or Protocols) 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 associated 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			

6 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 on 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

Parameters	
Document Title	☐ Exclude?
Document Route Status	All ☐ Exclude?
Action Requested	All ☐ Exclude?
Action Requested Group	No Filtering ☐ Exclude?
Document Type	Q ☐ Exclude?
Date Created	from: to: ☐ Exclude?
Date Last Assigned	from: to: ☐ Exclude?

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.

Click the Clear button to clear all filters and start fresh. Click the Reset button to reset filters to their default values. Remember to remove or update filtering criteria whenever possible to ensure you are not unintentionally hiding new items that require your attention. Click the Cancel button to exit the Action List Filter.

The Show/Hide Button

The Show button appears in the first column of the Action List for some 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:

Hide	COM	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		
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Project Title: special review

Proposal No.: 107

Proposal Type: New

Activity Type: Research

Sponsor: National Institutes of Health

Lead Unit: 102020

PI: Pediatrics Professor

Dates: Proposal Due Date: 09/01/2015

Start Date: 09/01/2015

End Date: 09/30/2015

Amounts: Total Direct Cost: \$10,000.00

Total F&A Cost: \$5,000.00

Total All Cost: \$15,000.00

[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:

Hide	FYI	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](#)

Clicking the FYI button removes the entire FYI Notification from your Action List.

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



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 Columns

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 Title of the document varies depending on the module from which the document originates. This field will offer additional information on document contents. For most documents this will populate with the associated Document Overview Description .	
Route Status	This field reports the workflow status of each item. Statuses are:	
	ENROUTE	The document is complete and has been submitted for approval.
	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	Remove FYI Notifications. See the FYI Default Actions section below.	

Column Name	Description
Log 	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 the Route Log section below. For Notifications, clicking this button will only provide the log for the Notification, not for the parent document for which the notification was generated.

Note: You can reorder your Action List by clicking on any of the column headers as desired.

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 various Actions in Streamlyne Research.

Action Name	Description
Acknowledge	Click this button to respond to an Acknowledgement Request on your Action List.

Action Name	Description
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.
Blanket Approve	Click this button to indicate two things: 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; 2. It is appropriate for the document to bypass all regular workflow reviews. Users who would normally review this item will receive Acknowledgement Notifications instead. Administrator privileges are required to perform this Action.
Cancel	Click this button to indicate the document is VOID and should be disregarded. Note that cancelled documents <u>cannot</u> be modified in any way and will not route for approval. This is a final action.
Close	Click this button to exit a document. Once clicked, the system will prompt you to save any changes before exiting. 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.
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. See also Reject.
FYI	Click this button to acknowledge an FYI Notification on your Action List.
Recall	Click this button to recall a document from Workflow Approval Routing.

Action Name	Description
Reload	Click this button to refresh the screen with the most recently saved data. Make sure to save any changes before clicking Reload.
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. See also Disapprove.
Route for Review	Click this button to route a document into your internal Initial Review process for proposals.
Route Report	Click the button to open a Route Log for the document in a new browser tab.
Save	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.
Save XML	Click this button to download S2S form-specific XML.
Send AdHoc	Click this button to send documents AdHoc for recipient to Approve, FYI, or Acknowledge at any time.
Send Notification	Click this button to send an internal message about a specific document as a Notification at any time.
Submit	Click this button to move a document through workflow to the first/next approver. Once submitted, the document's Route Status updates to ENROUTE until all approvals are complete.
Submit to S2S	This option is specific to Proposal Development documents only. Click the Submit to S2S button to send a Proposal Development document directly to the federal Grants.gov system. This system-to-system (S2S) electronic transmittal option is limited to funding opportunities where the sponsoring agency has made this option available.

Action Name	Description
Submit to Sponsor	This option is specific to Proposal Development documents only. The Submit to Sponsor 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. This does NOT send the proposal electronically to the Sponsor.

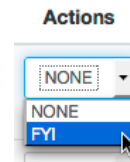
FYI Default Actions

Unlike other Action types, FYI Notifications can be acknowledged from the within 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 and remove it from your Action List in this way:

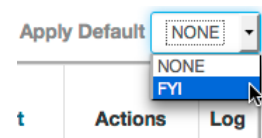
1. Select FYI from the dropdown list in the Actions column next to any item(s) you wish to acknowledge.
2. Click the Take Action button located at the bottom of the page.



Take Action

You may also choose to complete FYI Actions en masse. Follow these steps to acknowledge all your FYI Notifications at once and remove them from your Action List:

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.

Take Action

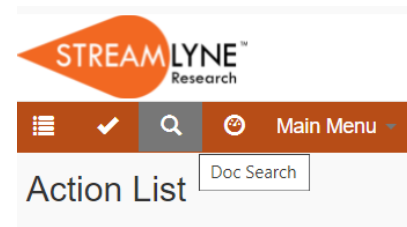
Searching with Lookups

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

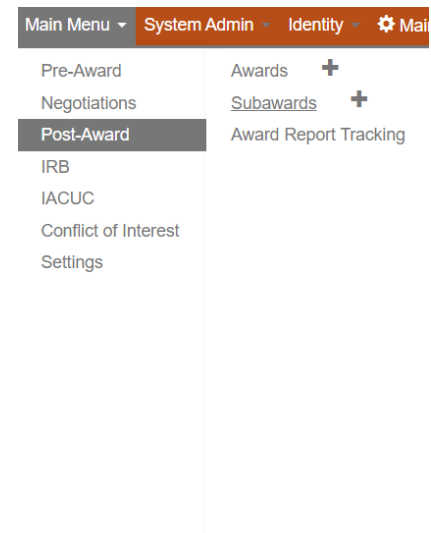
As previously covered, click the magnifying glass on the Menu Bar to access the Document Lookup.

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



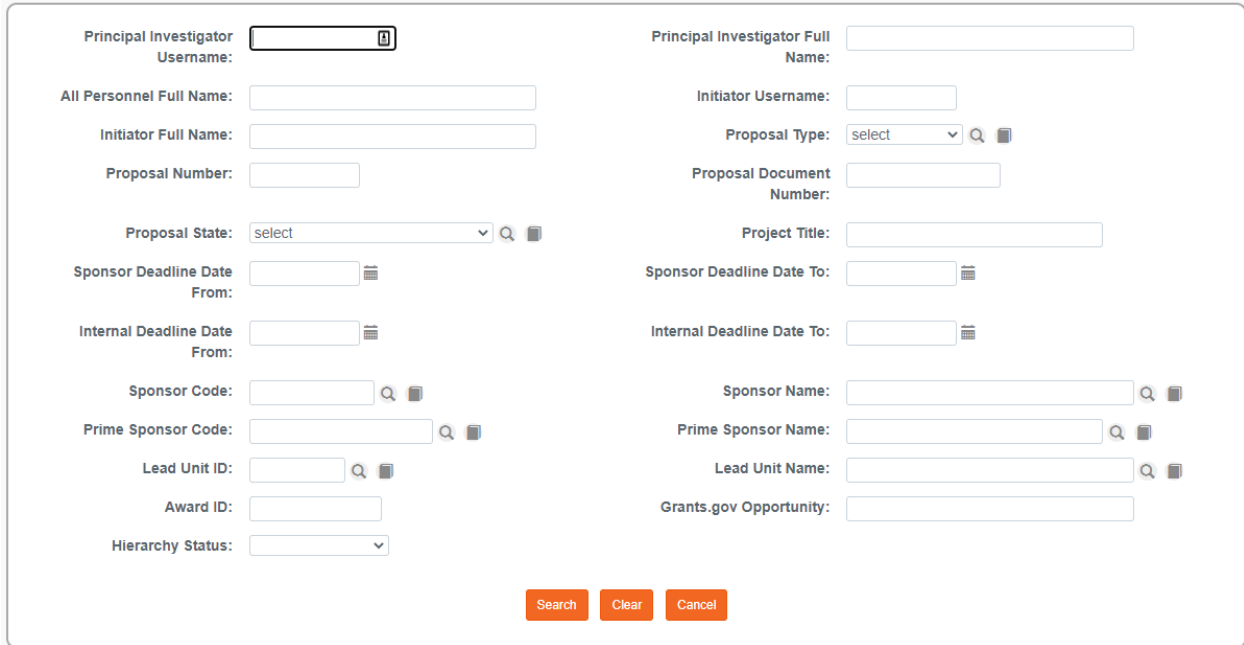
Searching Within A Module

If you would like to search for a document specific to 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 that module.



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

Development Proposal Lookup



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

Click the Clear button to clear all search fields and start a new search. Click the Cancel button to exit the Lookup.

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 that Lookup function.

If you would like to see more information on a particular field entry that you have selected prior to running the search, click the associated direct inquiry book icon  if available for further details.

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 personnel listed on a Proposal with a first name that begins with the letter B, enter B* into the **All Personnel Full Name** field.
- To search for all Protocols with the term arthritis in the project title, enter *arthritis* in the **Title** field.
- To search for all **Sponsors** with a name that includes the term cancer, enter *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.

Searching with Smart Search

When Smart Search is enabled, three options – Starts With, Contains, and Exact – will appear on the Lookup screen. Select one of the radio buttons to utilize one of the Smart Search options.

☐ Starts With ☐ Contains ☐ Exact

Search

Clear

Cancel

- **Starts With:** Returns search results based on the starting text entered in one or more fields.
- **Contains:** Returns search results that contain the text entered in one or more fields.
- **Exact:** Returns search results that match the exact text entered in one or more fields.

Understanding Common Document Elements

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 a header that displays in the upper right hand corner of the document just 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 may include the following information:

- **Document Number:** The unique, system-generated document identifier. This is the identifier referenced in the Document Search function.
- **Document Status:** This represents the state of the document relative to completion (e.g., SAVED/FINAL. This is unrelated to Submission Status
- **Initiator Network Id:** The username of the person that created the document.
- **Creation Timestamp:** The time and date the document was initially created.

Document Overview

The Document Overview section appears at the top of most every Streamlyne Research document. 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.

Special Note: The Document Overview **Description** field populates the document **Title** on the Action List.

Document Overview

* Description :
Document Overview Description

Explanation :

Organization Document Number :

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

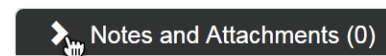
The Notes and Attachments section provides a place to track supporting content collected during the life of the document. Certain modules, like Proposal Development and Protocol modules, have attachment functionality that is a bit more complex than that displayed here. This section describes the steps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

Notes and Attachments (0)

Notes ?

Posted Timestamp	Author	* Note Topic	* Note Text	Restricted?	Attached File	Actions
Add:				☐	Choose File No file chosen Cancel Add	

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.



4. 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.

5. 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.

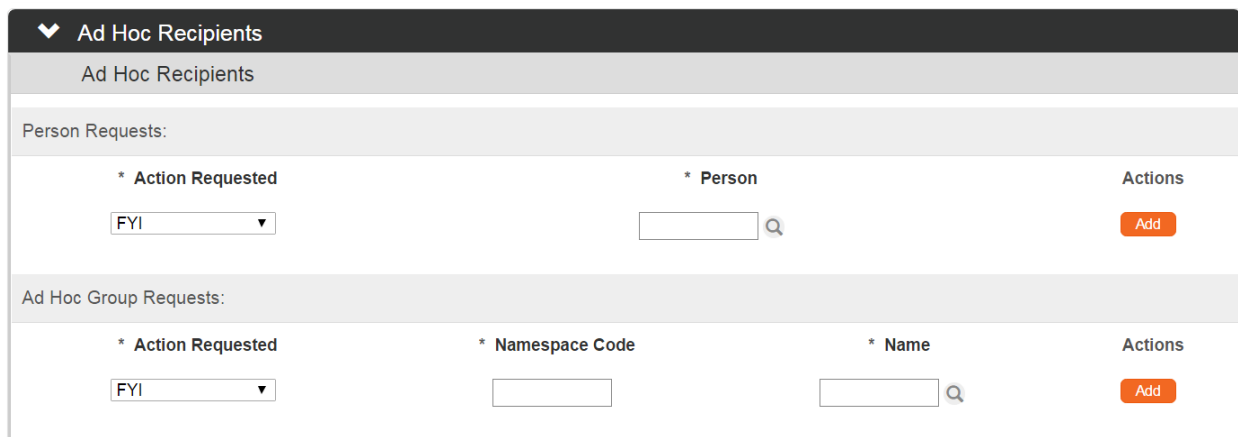
Note The **File Upload** option is not included in the Notes section for every module.

6. Click the Add button to complete this process. 

Ad Hoc Recipients

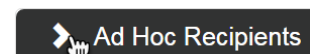
The functionality in the Ad Hoc Recipients section offers the flexibility to include individuals or workgroups in this specific document's workflow who may be outside the predefined routing path. You will find this section included on the Actions tab for any document—like the Award Actions tab, for example.

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.



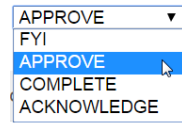
The screenshot shows the 'Ad Hoc Recipients' panel. It has a dark header with a dropdown arrow and the text 'Ad Hoc Recipients'. Below the header, the text 'Ad Hoc Recipients' is repeated. The panel is divided into two sections: 'Person Requests' and 'Ad Hoc Group Requests'. Each section has a table with columns for 'Action Requested', 'Person' (or 'Namespace Code' and 'Name' for groups), and 'Actions'. In the 'Person Requests' section, the 'Action Requested' column has a dropdown menu with 'FYI' selected, the 'Person' column has a text input field with a search icon, and the 'Actions' column has an 'Add' button. In the 'Ad Hoc Group Requests' section, the 'Action Requested' column has a dropdown menu with 'FYI' selected, the 'Namespace Code' column has a text input field, the 'Name' column has a text input field with a search icon, and the 'Actions' column has an 'Add' button.

1. 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.

* Action Requested



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 Pending Action Requests and Future Action Requests panels to see next steps in the configured workflow.
- Enter a brief 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

Title

Proposal; Proposal No: 188; PI: null; Sponsor: National Institutes of Health; Due Date: null

Type

Proposal Development Document

Created

01:43 PM 01/27/2017

Initiator

Admin, System

Last Modified

02:29 PM 01/27/2017

Route Status

SAVED

Last Approved

Document Status

Document Status Modified

Node(s)

Initiated

Finalized

▼ 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
show	IN ACTION LIST COMPLETE	Admin, System	01:44 PM 01/27/2017	

➤ Future Action Requests

▼ Log Action Message

Action Message

Log Action Message

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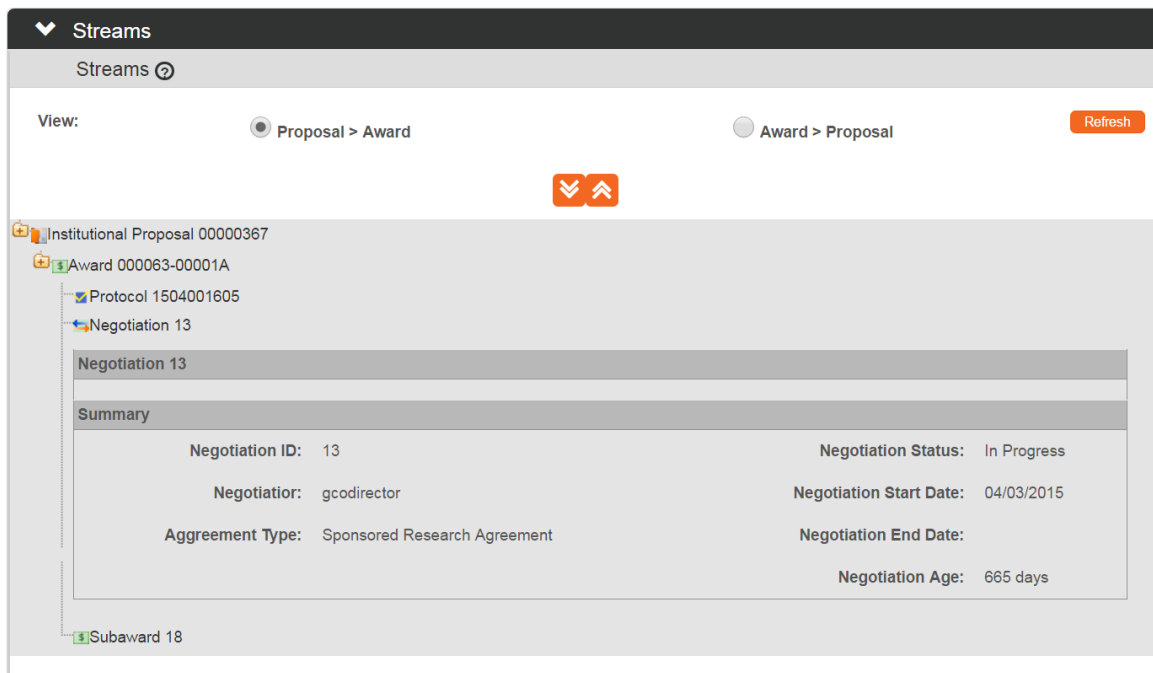
Streams

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.

Streams

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. At the top, there's a 'Streams' header with a question mark icon. Below it, a 'View:' section has two radio buttons: 'Proposal > Award' (selected) and 'Award > Proposal'. A 'Refresh' button is on the right. In the center, there are two orange arrows pointing up and down. The main content area shows a hierarchy of documents: 'Institutional Proposal 00000367' (with a plus icon), 'Award 000063-00001A' (with a plus icon), 'Protocol 1504001605' (with a plus icon), and 'Negotiation 13' (with a plus icon). Below 'Negotiation 13', there's a 'Summary' section with a table of details.

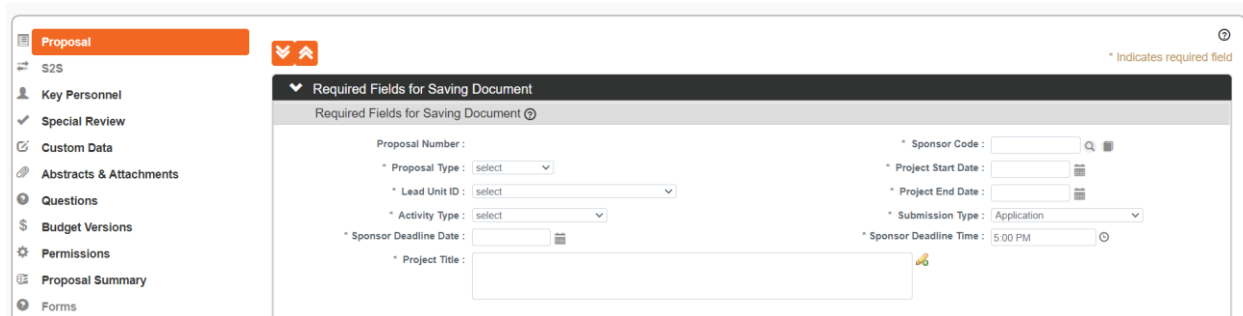
Summary	
Negotiation ID:	13
Negotiation:	gcodirector
Agreement Type:	Sponsored Research Agreement
Negotiation Status:	In Progress
Negotiation Start Date:	04/03/2015
Negotiation End Date:	
Negotiation Age:	665 days

At the bottom, there's a 'Subaward 18' link.

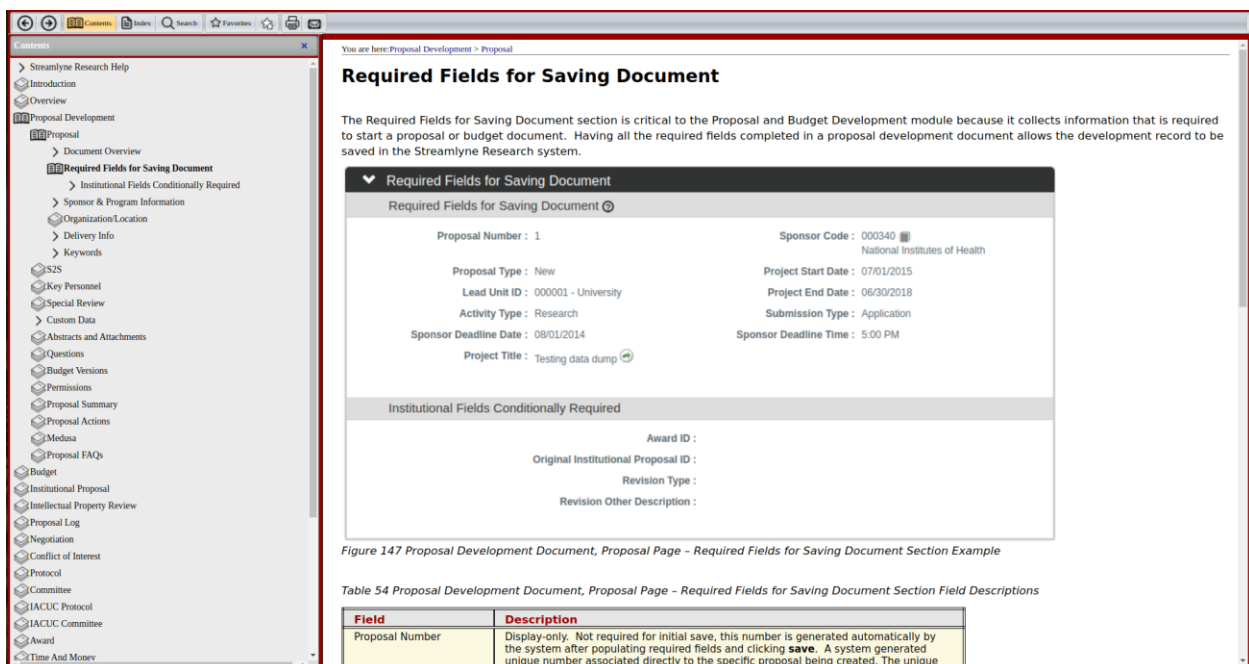
Help

Online Help is available throughout Streamlyne Research. Click on the Question Mark  symbol to access the Online Help. If the Question Mark symbol is in the upper right hand corner of the document, the user will be directed to the Online Help for that particular tab. If the Question Mark symbol is within a panel or subpanel header, the user will be directed to the Online Help for that particular panel.

For example, a user may select the Question Mark symbol next to the Required Fields for Saving Document in the subpanel header of a Proposal Development document.



The associated Online Help particular to Required Fields for Saving Document would then open in a new browser window or tab.



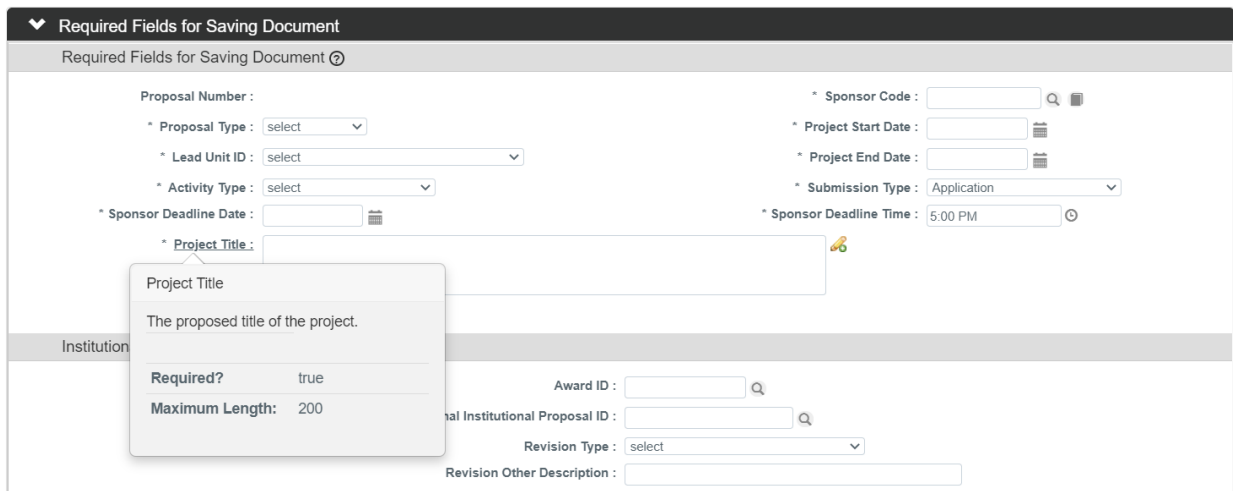
Required Fields for Saving Document

The Required Fields for Saving Document section is critical to the Proposal and Budget Development module because it collects information that is required to start a proposal or budget document. Having all the required fields completed in a proposal development document allows the development record to be saved in the Streamlyne Research system.

Field	Description
Proposal Number	Display-only. Not required for initial save, this number is generated automatically by the system after populating required fields and clicking save . A system generated unique number associated directly to the specific proposal being created. The unique

Additionally, field level Online Help is also available throughout Streamlyne. A user may hover over any fieldname and information on that field will display:

- Fieldname
- Description
- Required?
- Maximum Length



Required Fields for Saving Document

Required Fields for Saving Document ?

Proposal Number :

* Proposal Type : select

* Lead Unit ID : select

* Activity Type : select

* Sponsor Deadline Date :

* Project Title :

* Sponsor Code :

* Project Start Date :

* Project End Date :

* Submission Type : Application

* Sponsor Deadline Time : 5:00 PM

Institution

Award ID :

al Institutional Proposal ID :

Revision Type : select

Revision Other Description :

Project Title

The proposed title of the project.

Required?	true
Maximum Length:	200

Appendix A: Document Types

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
42703	NegotiationDocument	Negotiation Document
42709	ProtocolOnlineReviewDocument	IRB Protocol Review
42717	CommitteeDocument	Committee Document
42755	TimeAndMoneyDocument	Time And Money
42853	KcMaintenanceDocument	Maintenance Document
42887	PersonMassChangeDocument	Person Mass Change

Id	Name	Label
42896	InstitutionalProposalDocument	Institutional Proposal
42906	IacucProtocolOnlineReviewDocument	IACUC Protocol Review
42919	BudgetDocument	Budget Document
42925	SubAwardDocument	Subaward
44142	AwardBudgetDocument	Award Budget Document
71113	CommonCommitteeDocument	Common Committee Document
71114	QuickProposalDocument	Quick Proposal
71120	AwardDocument	Award
71122	ProposalDevelopmentDocument	Proposal Development Document
71125	IacucProtocolDocument	IACUC Protocol
71126	CoiDisclosureDocument	COI Disclosure
71127	FinancialEntityDocument	Financial Entity
71129	IacucAnimalUseDocument	Animal Use
71130	ProtocolDocument	IRB Protocol

Maintenance Documents: Award Module

Id	Name	Label
42672	IntellectualPropertyReviewMaintenanceDocument	Intellectual Property Review
42678	AwardTemplateMaintenanceDocument	Sponsor Template

Id	Name	Label
42681	AwardTypeMaintenanceDocument	Award Type
42687	ReportClassMaintenanceDocument	Report Class
42701	AwardStatusMaintenanceDocument	Award Status Type
42714	ContactTypeMaintenanceDocument	Contact Type
42729	IntellectualPropertyReviewResultTypeMaintenanceDocument	IP Review Result Type
42734	AwardTemplateContactMaintenanceDocument	Sponsor Template Contact
42742	AwardTemplateReportTermMaintenanceDocument	Edit Sponsor Template Reports
42788	ReportMaintenanceDocument	Report Type
42792	AwardTemplateTermMaintenanceDocument	Sponsor Template Report Terms
42802	AwardMethodOfPaymentMaintenanceDocument	Award Basis Of Payment
42818	AccountTypeMaintenanceDocument	Account Type
42834	FrequencyMaintenanceDocument	Frequency
42842	AwardAttachmentTypeMaintenanceDocument	Award Attachment Type
42864	ProtocolOnlineReviewStatusMaintenanceDocument	Protocol Review Status Code
42868	IacucProtocolOnlineReviewStatusMaintenanceDocument	Iacuc Protocol Review Status Code
42869	IntellectualPropertyReviewRequirementTypeMaintenanceDocument	IP Review Requirement Type
42878	AwardTemplateCommentMaintenanceDocument	Sponsor Template Comment
42897	IacucProtocolOnlineReviewDeterminRecommendMaintenanceDocument	Protocol Review Determination Recommendation Code
42903	FrequencyBaseMaintenanceDocument	Frequency Base

Id	Name	Label
42912	IntellectualPropertyReviewActivityTypeMaintenanceDocument	IP Review Activity Type
42922	ProtocolOnlineReviewDeterminRecommendMaintenanceDocument	Protocol Review Determination Recommendation Code
42931	AwardTemplateReportTermRecipientMaintenanceDocument	Sponsor Template Report Term Recipient
42937	AwardBasisOfPaymentMaintenanceDocument	Award Basis Of Payment
42945	ReportStatusMaintenanceDocument	Report Status
42947	DistributionMaintenanceDocument	OSP File Copy
42954	CommentTypeMaintenanceDocument	Comment Type
71112	SubAwardContactTypeMaintenanceDocument	SubAward Contact Type

Maintenance Documents: Shared Compliance Configuration

Id	Name	Label
42665	ScheduleStatusMaintenanceDocument	Schedule Status
42669	AttachmentsEntryTypeMaintenanceDocument	Attchments Entry Type
42670	IacucProtocolContingencyMaintenanceDocument	IACUC Protocol Contingency
42674	IacucExceptionCategoryMaintenanceDocument	Exception Category Maintenance Document
42677	ProtocolReviewerTypeMaintenanceDocument	Protocol Reviewer Type
42682	IacucProcedureCategoryCustomDataMaintenanceDocument	IacucProcedureCategoryCustomData Maintenance Document
42684	ProtocolReviewTypeMaintenanceDocument	Protocol Review Type

Id	Name	Label
42686	ProtocolAttachmentGroupMaintenanceDocument	Protocol Attachment Group Maintenance Document
42690	ProtocolActionTypeMaintenanceDocument	Protocol Action Type
42691	IacucProcedureCategoryMaintenanceDocument	Procedure Category Maintenance Document
42692	IacucLocationTypeMaintenanceDocument	Location Type Maintenance Document
42694	ScheduleActItemTypeMaintenanceDocument	Schedule Act Item Type
42696	IacucProtocolAffiliationTypeMaintenanceDocument	IACUC Affiliation Type Maintenance Document
42702	IacucProtocolTypeMaintenanceDocument	IACUC Protocol Type
42707	IacucProtocolActionTypeMaintenanceDocument	IACUC Protocol Action Type
42716	CommitteeMembershipTypeMaintenanceDocument	Committee Membership Type
42725	ProtocolSubmissionQualifierTypeMaintenanceDocument	Protocol Submission Qualifier Type Maintenance Document
42730	IacucProtocolSubmissionQualifierTypeMaintenanceDocument	IACUC Protocol Submission Qualifier Type Maintenance Document
42739	ProtocolSubmissionStatusMaintenanceDocument	Protocol Submission Status
42740	ProtocolReferenceTypeMaintenanceDocument	Protocol Reference Type
42747	IacucValidProtoSubTypeQualMaintenanceDocument	IACUC Valid Protocol Submission Type Qualifier
42753	FundingSourceTypeMaintenanceDocument	Funding Source Type
42760	ExpeditedReviewCheckListMaintenanceDocument	Expedited Review CheckList Item

Id	Name	Label
42790	ProtocolContingencyMaintenanceDocument	Protocol Contingency
42793	KcAffiliationTypeMaintenanceDocument	IRB Affiliation Type Maintenance Document
42800	IacucProtocolAttachmentTypeGroupMaintenanceDocument	IACUC Protocol Attachment Type Group Maintenance Document
42808	IacucLocationNameMaintenanceDocument	Location Name Maintenance Document
42811	IacucProtocolAttachmentStatusMaintenanceDocument	IACUC Protocol Attachment Status Maintenance Document
42812	IacucSpeciesCountTypeMaintenanceDocument	Species Count Type Maintenance Document
42815	IacucProtocolSubmissionTypeMaintenanceDocument	IACUC Protocol Submission Type
42816	IacucAlternateSearchDatabaseMaintenanceDocument	IACUC Alternate Search Database Maintenance Document
42826	ExemptStudiesCheckListMaintenanceDocument	Exempt Studies CheckList Item
42835	IacucPersonTrainingMaintenanceDocument	IACUC Person Training Maintenance Document
42837	ParticipantTypeMaintenanceDocument	Participant Type
42846	MinuteEntryTypeMaintenanceDocument	Minute Entry Type
42850	CommitteeTypeMaintenanceDocument	Committee Type
42857	ProtocolStatusMaintenanceDocument	Protocol Status Maintenance Document
42866	IacucProtocolReferenceTypeMaintenanceDocument	IACUC Protocol Reference Type
42867	IacucProtocolReviewTypeMaintenanceDocument	IACUC Protocol Review Type

Id	Name	Label
42870	IacucProtocolStatusMaintenanceDocument	IACUC Protocol Status Maintenance Document
42871	IacucProtocolReviewerTypeMaintenanceDocument	IACUC Protocol Reviewer Type
42873	CommitteeDecisionMotionTypeMaintenanceDocument	Committee Decision Motion Type
42875	ProtocolAttachmentTypeMaintenanceDocument	Protocol Attachment Type Maintenance Document
42876	IacucSpeciesMaintenanceDocument	Species Maintenance Document
42881	ProtocolAttachmentStatusMaintenanceDocument	Protocol Attachment Status Maintenance Document
42884	CoiAttachmentTypeMaintenanceDocument	Coi Attachment Type Maintenance Document
42891	ProtocolAttachmentTypeGroupMaintenanceDocument	Protocol Attachment Type Group Maintenance Document
42893	IacucProtocolOnlineReviewDeterminTypeRecommendMaintDocument	IACUC Protocol Review Determination Type Recommendation Code
42899	IacucProtocolAttachmentTypeMaintenanceDocument	IACUC Protocol Attachment Type Maintenance Document
42902	ProtocolSubmissionTypeMaintenanceDocument	Protocol Submission Type
42909	IacucProtocolProjectTypeMaintenanceDocument	IACUC Protocol Project Type
42915	MembershipRoleMaintenanceDocument	Membership Role
42940	IacucProtocolAttachmentGroupMaintenanceDocument	Protocol Attachment Group Maintenance Document
42942	IacucProcedureMaintenanceDocument	Procedure Maintenance Document
42946	ProtocolTypeMaintenanceDocument	Protocol Type Maintenance Document

Id	Name	Label
42957	IacucPainCategoryMaintenanceDocument	Pain Category Maintenance Document
71128	IacucValidAnimalUseTypeMaintenanceDocument	Valid Animal Use Type Maintenance Document
71132	IacucAnimalUseTypeMaintenanceDocument	Animal Use Type Maintenance Document

Maintenance Documents: Foundational Configuration

Id	Name	Label
42060	ReportsToOrgMaintenanceDocument	Reports To Org Maintenance Document
42664	SubAwardFormsMaintenanceDocument	Subaward Forms Maintenance Document
42668	IacucCorrespondentTypeMaintenanceDocument	IACUC Correspondent Type
42671	ScienceKeywordMaintenanceDocument	Science Keyword
42675	FinIntEntityStatusMaintenanceDocument	Financial Interest Entity Status Maintenance Document
42679	QuestionTypeMaintenanceDocument	Questionnaire Type
42680	IacucProtocolPersonRoleMaintenanceDocument	IACUC Protocol Person Role
42683	SponsorFormsMaintenanceDocument	Sponsor Form
42685	PersonSignatureMaintenanceDocument	Person Signature Details
42688	ValidProtoSubRevTypeMaintenanceDocument	Valid Protocol Submission Review Type
42689	QuestionMaintenanceDocument	Question
42695	NoticeOfOpportunityMaintenanceDocument	Notice of Opportunity

Id	Name	Label
42698	IacucUnitCorrespondentMaintenanceDocument	IACUC Unit Correspondent Maintenance Document
42699	BudgetCategoryMappingMaintenanceDocument	Budget Category Mapping Maintenance Document
42700	BudgetCategoryTypeMaintenanceDocument	Budget Category Type Maintenance Document
42704	ProtocolCorrespondenceTemplateMaintenanceDocument	Correspondence Template
42705	ValidSpecialReviewApprovalMaintenanceDocument	Valid Special Review Approval Maintenance Document
42710	RolodexMaintenanceDocument	Address Book
42712	S2sProviderMaintenanceDocument	S2S Provider
42713	IacucProtocolCorrespondenceTypeMaintenanceDocument	IACUC Protocol Correspondence Type
42715	Questionnaire Questions Maintenance Document	Questionnaire Questions
42719	ValidRatesMaintenanceDocument	Valid Rates
42720	MessageOfTheDayMaintenanceDocument	Message Of The Day Maintenance Document
42721	InstituteLaRateMaintenanceDocument	Institute La Rates Maintenance Document
42726	UnitAdministratorMaintenanceDocument	Unit Administrator
42727	PersonMaintenanceDocument	Person
42728	Protocol Organization Type Maintenance Document	Protocol Protocol Organization Type
42731	ValidAwardBasisPaymentMaintenanceDocument	Valid Award Basis Payment Maintenance Document

Id	Name	Label
42732	IacucProtocolOrganizationTypeMaintenanceDocument	IACUC Protocol Organization Type Maintenance Document
42733	IacucProtocolCorrespondenceTemplateMaintenanceDocument	IACUC Correspondence Template
42735	TrainingMaintenanceDocument	Training
42736	QuestionnaireMaintenanceDocument	Questionnaire
42737	ValidProtoSubTypeQualMaintenanceDocument	Valid Protocol Submission Type Qualifier
42738	ActivityTypeMaintenanceDocument	Activity Type Maintenance Document
42741	FinIntEntityRelTypeMaintenanceDocument	Financial Interest Entity Relationship Type Maintenance Document
42743	InvestigatorCreditTypeMaintenanceDocument	Investigator Credit Type
42744	InstituteRateMaintenanceDocument	Institute Rates Maintenance Document
42746	CustReportTypeMaintenanceDocument	CustReport Type MaintenanceDocument
42748	SponsorMaintenanceDocument	Sponsor
42749	RateTypeMaintenanceDocument	Rate Type Maintenance Document
42750	PersonTrainingMaintenanceDocument	Person Training Maintenance Document
42751	CoiCommitteeRoleTypeMaintenanceDocument	Coi Committee Role Type Maintenance Document
42754	ProposalTypeMaintenanceDocument	Proposal Type
42756	S2sOppFormQuestionnaireMaintenanceDocument	S2S Opportunity Form to Questionnaire Mapping
42757	FinancialIndirectCostRecoveryTypeCodeMaintenanceDocument	Financial Indirect Cost Recovery Type Code Maintenance Document

Id	Name	Label
42761	ProtocolCorrespondenceTypeMaintenanceDocument	Protocol Correspondence Type
42762	SubawardReportFrequencyMaintenanceDocument	Subaward Report Frequency Maintenance Document
42764	CostShareTypeMaintenanceDocument	Cost Share Type
42765	FandaRateTypeMaintenanceDocument	F & A Rate Type
42770	RateClassMaintenanceDocument	Rate Class Maintenance Document
42771	ValidBasisMethodPaymentMaintenanceDocument	Valid Basis Method Payment Maintenance Document
42772	SubAwardReportTypeMaintenanceDocument	Subaward Report Type
42773	ProposalLogMaintenanceDocument	Proposal Log
42774	FinancialObjectCodeMappingMaintenanceDocument	FinancialObjectCodeMapping Maintenance Document
42775	Proposal Log Type Maintenance Document	Proposal Log Type Maintenance Document
42777	FinEntitiesDataGroupMaintenanceDocument	Financial Entity Data Group Maintenance Document
42778	FinEntitiesDataMatrixMaintenanceDocument	Financial Entity Data Matrix Maintenance Document
42780	ProtocolNotificationTemplateMaintenanceDocument	Notification Template
42781	CoiRecomendedActionTypeMaintenanceDocument	Coi Recomendted Action Type Maintenance Document
42785	BatchCorrespondenceMaintenanceDocument	Batch Correspondence
42787	CustReportDetailsMaintenanceDocument	CustReport Details MaintenanceDocument

Id	Name	Label
42789	NotificationModuleRoleMaintenanceDocument	Notification Module
42791	ProtocolPersonRoleMaintenanceDocument	Protocol Person Role
42794	QuestionCategoryMaintenanceDocument	Question Category
42797	CoiReviewTypeMaintenanceDocument	Coi Review Type Maintenance Document
42799	IacucOrganizationCorrespondentMaintenanceDocument	IACUC Organization Correspondent Maintenance Document
42801	UnitFormulatedCostMaintenanceDocument	Unit Formulated Cost
42803	Valid Frequency Base Maintenance Document	Valid Frequency Base Maintenance Document
42804	PersonSignatureModuleMaintenanceDocument	Person Signature Module Details
42805	OrganizationTypeMaintenanceDocument	Organization
42807	KcKrmsTermFunParamSpecMaintenanceDocument	Krms Term Stored Function Params
42809	CostElementMaintenanceDocument	Cost Element Maintenance Document
42810	SubAwardStatusMaintenanceDocument	Subaward Status Maintenance Document
42813	ValidIacucProtocolActionCorrespondenceMaintenanceDocument	IACUC Correspondence Generated
42814	CoiDispositionStatusMaintenanceDocument	Coi Disposition Status Maintenance Document
42817	SubAwardInvoiceMaintenanceDocument	Subaward Invoice
42820	SponsorTypeMaintenanceDocument	Sponsor Type
42822	RateClassBaseInclusionMaintenanceDocument	Rate Class Inclusion Maintenance Document

Id	Name	Label
42823	ArgValueLookupMaintenanceDocument	Argument Value
42824	ValidSubawardReportFrequencyMaintenanceDocument	Valid Subaward Report Frequency Maintenance Document
42825	SpecialReviewApprovalTypeMaintenanceDocument	Special Review Approval Type
42827	ValidCalcTypeMaintenanceDocument	Valid Calc Types Maintenance Document
42828	SubAwardTemplateTypeMaintenanceDocument	Subaward Template Type Maintenance Document
42829	CitizenshipTypeMaintenanceDocument	Citizenship Type
42831	CloseoutReportTypeMaintenanceDocument	Closeout Report Type
42832	YnqMaintenanceDocument	YnqMaintenanceDocument
42833	Proposal Status Maintenance Document	Proposal Status Maintenance Document
42838	NotificationTypeMaintenanceDocument	Notification
42839	SpecialReviewTypeMaintenanceDocument	Special Review Type
42840	SubAwardCostTypeMaintenanceDocument	Subaward Cost Type Maintenance Document
42841	SchoolCodeMaintenanceDocument	School Code
42843	IacucResearchAreasMaintenanceDocument	Report Area
42845	ValidProtocolActionActionMaintenanceDocument	Protocol Follow-up Actions Maintenance Document
42847	CloseoutTypeMaintenanceDocument	Closeout Type Maintenance Document
42848	ContactUsageMaintenanceDocument	Contact Usage

Id	Name	Label
42851	CoiStatusMaintenanceDocument	Coi Status Maintenance Document
42852	ValidCeJobCodeMaintenanceDocument	Valid Cost Element Job Code
42854	SubAwardApprovalTypeMaintenanceDocument	Subaward Approval Type Maintenance Document
42855	UnitCorrespondentMaintenanceDocument	Unit Correspondent Maintenance Document
42856	Proposal Log Status Maintenance Document	Proposal Log Status Maintenance Document
42858	CustRptTypeDocumentMaintenanceDocument	CustRpt Type Document
42859	IacucValidProtocolActionActionMaintenanceDocument	IACUC Protocol Follow-up Actions Maintenance Document
42860	SponsorFormTemplateMaintenanceDocument	Sponsor Form Template
42861	CustRptDefaultParmsMaintenanceDocument	CustRpt Default Parms MaintenanceDocument
42865	BatchCorrespondenceDetailMaintenanceDocument	Batch Correspondence Detail
42879	CoiReviewStatusMaintenanceDocument	Coi Review Status Maintenance Document
42882	SubAwardAttachmentTypeMaintenanceDocument	Subaward Attachment Type
42883	CoeusModuleMaintenanceDocument	Streamlyne Research Module
42885	OrganizationCorrespondentMaintenanceDocument	Organization Correspondent Maintenance Document
42888	OrganizationMaintenanceDocument	Organization Maintenance Document
42889	BudgetCategoryMapMaintenanceDocument	Budget Category Maps Maintenance Document

Id	Name	Label
42890	CorrespondentTypeMaintenanceDocument	Correspondent Type
42892	SubAwardCopyRightsTypeMaintenanceDocument	Subaward Copyrights Type Maintenance Document
42894	CoiNoteTypeMaintenanceDocument	Coi Note Type Maintenance Document
42901	ValidNarrFormsMaintenanceDocument	Valid Narrative Type - S2S Form
42904	RateClassBaseExclusionMaintenanceDocument	Rate Class Exclusion Maintenance Document
42905	FormulatedTypeMaintenanceDocument	Formulated Type
42908	CoiReviewerMaintenanceDocument	Coi Reviewer Maintenance Document
42911	UnitAdministratorTypeMaintenanceDocument	Administrator Type
42913	CFDAMaintenanceDocument	CFDA Maintenance Document
42914	NsfCodeMaintenanceDocument	NSF Code
42918	Questionnaire Usage Maintenance Document	Questionnaire Usage
42920	ValidCeRateTypeMaintenanceDocument	Valid Cost Element Rate Types Maintenance Document
42921	Coeus Sub Module Maintenance Document	Streamlyne Research Sub Module
42923	SpecialReviewUsageMaintenanceDocument	Special Review Usage
42927	CoiDisclosureStatusMaintenanceDocument	Coi Disclosure Status Maintenance Document
42928	IacucValidProtoSubRevTypeMaintenanceDocument	IACUC Valid Protocol Submission Review Type
42934	ResearchAreasMaintenanceDocument	Report Area

Id	Name	Label
42936	OrganizationTypeListMaintenanceDocument	Organization
42938	ValidProtocolActionCorrespondenceMaintenanceDocument	Correspondence Generated
42939	TrainingStipendRateMaintenanceDocument	Training Stipend Rate Maintenance Document
42943	WatermarkMaintenanceDocument	Watermark Details
42948	SponsorHierarchyMaintenanceDocument	Sponsor Hierarchy
42950	CoiDisclosureEventTypeMaintenanceDocument	Coi Event Type Maintenance Document
42952	Valid Class Report Freq Maintenance Document	Valid Class Report Frequency Maintenance Document
42953	KcKrmsTermFunctionMaintenanceDocument	Krms Term Stored Function
42956	RateClassTypeMaintenanceDocument	Rate Class Type Maintenance Document
45484	TrainingLMSMaintenanceDocument	Training LMS
45486	TrainingModulesMaintenanceDocument	Training Modules
71109	FiscalPeriodMaintenanceDocument	Fiscal Period
71110	ReportsToUnitMaintenanceDocument	Reports to Unit Maintenance Document
71111	AccountNumberMaintenanceDocument	Account Number
71115	FiscalYearMaintenanceDocument	Fiscal Year
71116	StatementMaintenanceDocument	Statement Maintenance Document
71119	StatementTypeMaintenanceDocument	Statement Type Maintenance Document
71121	FinIntEntityTypeMaintenanceDocument	Financial Interest Entity Type Maintenance Document

Id	Name	Label
71123	ReportCustomAttributeMaintenanceDocument	ReportCustomAttribute Maintenance Document
71124	CustomAttributeDocumentMaintenanceDocument	Custom Attribute Document Maintenance Document
71131	ReportTypeMaintenanceDocument	ReportType Maintenance Document
71133	CustomAttributeMaintenanceDocument	Custom Attribute Maintenance Document
42060	ReportsToOrgMaintenanceDocument	Reports To Org Maintenance Document
42664	SubAwardFormsMaintenanceDocument	Subaward Forms Maintenance Document
42668	IacucCorrespondentTypeMaintenanceDocument	IACUC Correspondent Type
42671	ScienceKeywordMaintenanceDocument	Science Keyword
42675	FinIntEntityStatusMaintenanceDocument	Financial Interest Entity Status Maintenance Document
42679	QuestionTypeMaintenanceDocument	Questionnaire Type
42680	IacucProtocolPersonRoleMaintenanceDocument	IACUC Protocol Person Role
42683	SponsorFormsMaintenanceDocument	Sponsor Form
42685	PersonSignatureMaintenanceDocument	Person Signature Details
42688	ValidProtoSubRevTypeMaintenanceDocument	Valid Protocol Submission Review Type
42689	QuestionMaintenanceDocument	Question
42695	NoticeOfOpportunityMaintenanceDocument	Notice of Opportunity
42698	IacucUnitCorrespondentMaintenanceDocument	IACUC Unit Correspondent Maintenance Document

Id	Name	Label
42699	BudgetCategoryMappingMaintenanceDocument	Budget Category Mapping Maintenance Document
42700	BudgetCategoryTypeMaintenanceDocument	Budget Category Type Maintenance Document
42704	ProtocolCorrespondenceTemplateMaintenanceDocument	Correspondence Template
42705	ValidSpecialReviewApprovalMaintenanceDocument	Valid Special Review Approval Maintenance Document
42710	RolodexMaintenanceDocument	Address Book
42712	S2sProviderMaintenanceDocument	S2S Provider
42713	IacucProtocolCorrespondenceTypeMaintenanceDocument	IACUC Protocol Correspondence Type
42715	Questionnaire Questions Maintenance Document	Questionnaire Questions
42719	ValidRatesMaintenanceDocument	Valid Rates
42720	MessageOfTheDayMaintenanceDocument	Message Of The Day Maintenance Document
42721	InstituteLaRateMaintenanceDocument	Institute La Rates Maintenance Document
42726	UnitAdministratorMaintenanceDocument	Unit Administrator
42727	PersonMaintenanceDocument	Person
42728	Protocol Organization Type Maintenance Document	Protocol Protocol Organization Type
42731	ValidAwardBasisPaymentMaintenanceDocument	Valid Award Basis Payment Maintenance Document
42732	IacucProtocolOrganizationTypeMaintenanceDocument	IACUC Protocol Organization Type Maintenance Document

Id	Name	Label
42733	IacucProtocolCorrespondenceTemplateMaintenanceDocument	IACUC Correspondence Template
42735	TrainingMaintenanceDocument	Training
42736	QuestionnaireMaintenanceDocument	Questionnaire
42737	ValidProtoSubTypeQualMaintenanceDocument	Valid Protocol Submission Type Qualifier
42738	ActivityTypeMaintenanceDocument	Activity Type Maintenance Document
42741	FinIntEntityRelTypeMaintenanceDocument	Financial Interest Entity Relationship Type Maintenance Document
42743	InvestigatorCreditTypeMaintenanceDocument	Investigator Credit Type
42744	InstituteRateMaintenanceDocument	Institute Rates Maintenance Document
42746	CustReportTypeMaintenanceDocument	CustReport Type MaintenanceDocument
42748	SponsorMaintenanceDocument	Sponsor
42749	RateTypeMaintenanceDocument	Rate Type Maintenance Document
42750	PersonTrainingMaintenanceDocument	Person Training Maintenance Document
42751	CoiCommitteeRoleTypeMaintenanceDocument	Coi Committee Role Type Maintenance Document
42754	ProposalTypeMaintenanceDocument	Proposal Type
42756	S2sOppFormQuestionnaireMaintenanceDocument	S2S Opportunity Form to Questionnaire Mapping
42757	FinancialIndirectCostRecoveryTypeCodeMaintenanceDocument	Financial Indirect Cost Recovery Type Code Maintenance Document
42761	ProtocolCorrespondenceTypeMaintenanceDocument	Protocol Correspondence Type

Id	Name	Label
42762	SubawardReportFrequencyMaintenanceDocument	Subaward Report Frequency Maintenance Document
42764	CostShareTypeMaintenanceDocument	Cost Share Type
42765	FandaRateTypeMaintenanceDocument	F & A Rate Type
42770	RateClassMaintenanceDocument	Rate Class Maintenance Document
42771	ValidBasisMethodPaymentMaintenanceDocument	Valid Basis Method Payment Maintenance Document
42772	SubAwardReportTypeMaintenanceDocument	Subaward Report Type
42773	ProposalLogMaintenanceDocument	Proposal Log
42774	FinancialObjectCodeMappingMaintenanceDocument	FinancialObjectCodeMapping Maintenance Document
42775	Proposal Log Type Maintenance Document	Proposal Log Type Maintenance Document
42777	FinEntitiesDataGroupMaintenanceDocument	Financial Entity Data Group Maintenance Document
42778	FinEntitiesDataMatrixMaintenanceDocument	Financial Entity Data Matrix Maintenance Document
42780	ProtocolNotificationTemplateMaintenanceDocument	Notification Template
42781	CoiRecomendedActionTypeMaintenanceDocument	Coi Recomend Action Type Maintenance Document
42785	BatchCorrespondenceMaintenanceDocument	Batch Correspondence
42787	CustReportDetailsMaintenanceDocument	CustReport Details MaintenanceDocument
42789	NotificationModuleRoleMaintenanceDocument	Notification Module

Id	Name	Label
42791	ProtocolPersonRoleMaintenanceDocument	Protocol Person Role
42794	QuestionCategoryMaintenanceDocument	Question Category
42797	CoiReviewTypeMaintenanceDocument	Coi Review Type Maintenance Document
42799	IacucOrganizationCorrespondentMaintenanceDocument	IACUC Organization Correspondent Maintenance Document
42801	UnitFormulatedCostMaintenanceDocument	Unit Formulated Cost
42803	Valid Frequency Base Maintenance Document	Valid Frequency Base Maintenance Document
42804	PersonSignatureModuleMaintenanceDocument	Person Signature Module Details
42805	OrganizationTypeMaintenanceDocument	Organization
42807	KcKrmsTermFunParamSpecMaintenanceDocument	Krms Term Stored Function Params
42809	CostElementMaintenanceDocument	Cost Element Maintenance Document
42810	SubAwardStatusMaintenanceDocument	Subaward Status Maintenance Document
42813	ValidIacucProtocolActionCorrespondenceMaintenanceDocument	IACUC Correspondence Generated
42814	CoiDispositionStatusMaintenanceDocument	Coi Disposition Status Maintenance Document
42817	SubAwardInvoiceMaintenanceDocument	Subaward Invoice
42820	SponsorTypeMaintenanceDocument	Sponsor Type
42822	RateClassBaseInclusionMaintenanceDocument	Rate Class Inclusion Maintenance Document
42823	ArgValueLookupMaintenanceDocument	Argument Value

Id	Name	Label
42824	ValidSubawardReportFrequencyMaintenanceDocument	Valid Subaward Report Frequency Maintenance Document
42825	SpecialReviewApprovalTypeMaintenanceDocument	Special Review Approval Type
42827	ValidCalcTypeMaintenanceDocument	Valid Calc Types Maintenance Document
42828	SubAwardTemplateTypeMaintenanceDocument	Subaward Template Type Maintenance Document
42829	CitizenshipTypeMaintenanceDocument	Citizenship Type
42831	CloseoutReportTypeMaintenanceDocument	Closeout Report Type
42832	YnqMaintenanceDocument	YnqMaintenanceDocument
42833	Proposal Status Maintenance Document	Proposal Status Maintenance Document
42838	NotificationTypeMaintenanceDocument	Notification
42839	SpecialReviewTypeMaintenanceDocument	Special Review Type
42840	SubAwardCostTypeMaintenanceDocument	Subaward Cost Type Maintenance Document
42841	SchoolCodeMaintenanceDocument	School Code
42843	IacucResearchAreasMaintenanceDocument	Report Area
42845	ValidProtocolActionActionMaintenanceDocument	Protocol Follow-up Actions Maintenance Document
42847	CloseoutTypeMaintenanceDocument	Closeout Type Maintenance Document
42848	ContactUsageMaintenanceDocument	Contact Usage
42851	CoiStatusMaintenanceDocument	Coi Status Maintenance Document

Id	Name	Label
42852	ValidCeJobCodeMaintenanceDocument	Valid Cost Element Job Code
42854	SubAwardApprovalTypeMaintenanceDocument	Subaward Approval Type Maintenance Document
42855	UnitCorrespondentMaintenanceDocument	Unit Correspondent Maintenance Document
42856	Proposal Log Status Maintenance Document	Proposal Log Status Maintenance Document
42858	CustRptTypeDocumentMaintenanceDocument	CustRpt Type Document
42859	IacucValidProtocolActionActionMaintenanceDocument	IACUC Protocol Follow-up Actions Maintenance Document
42860	SponsorFormTemplateMaintenanceDocument	Sponsor Form Template
42861	CustRptDefaultParmsMaintenanceDocument	CustRpt Default Parms MaintenanceDocument
42865	BatchCorrespondenceDetailMaintenanceDocument	Batch Correspondence Detail
42879	CoiReviewStatusMaintenanceDocument	Coi Review Status Maintenance Document
42882	SubAwardAttachmentTypeMaintenanceDocument	Subaward Attachment Type
42883	CoeusModuleMaintenanceDocument	Streamlyne Research Module
42885	OrganizationCorrespondentMaintenanceDocument	Organization Correspondent Maintenance Document
42888	OrganizationMaintenanceDocument	Organization Maintenance Document
42889	BudgetCategoryMapMaintenanceDocument	Budget Category Maps Maintenance Document
42890	CorrespondentTypeMaintenanceDocument	Correspondent Type

Id	Name	Label
42892	SubAwardCopyRightsTypeMaintenanceDocument	Subaward Copyrights Type Maintenance Document
42894	CoiNoteTypeMaintenanceDocument	Coi Note Type Maintenance Document
42901	ValidNarrFormsMaintenanceDocument	Valid Narrative Type - S2S Form
42904	RateClassBaseExclusionMaintenanceDocument	Rate Class Exclusion Maintenance Document
42905	FormulatedTypeMaintenanceDocument	Formulated Type
42908	CoiReviewerMaintenanceDocument	Coi Reviewer Maintenance Document
42911	UnitAdministratorTypeMaintenanceDocument	Administrator Type
42913	CFDAMaintenanceDocument	CFDA Maintenance Document
42914	NsfCodeMaintenanceDocument	NSF Code
42918	Questionnaire Usage Maintenance Document	Questionnaire Usage
42920	ValidCeRateTypeMaintenanceDocument	Valid Cost Element Rate Types Maintenance Document
42921	Coeus Sub Module Maintenance Document	Streamlyne Research Sub Module
42923	SpecialReviewUsageMaintenanceDocument	Special Review Usage
42927	CoiDisclosureStatusMaintenanceDocument	Coi Disclosure Status Maintenance Document
42928	IacucValidProtoSubRevTypeMaintenanceDocument	IACUC Valid Protocol Submission Review Type
42934	ResearchAreasMaintenanceDocument	Report Area
42936	OrganizationTypeListMaintenanceDocument	Organization

Id	Name	Label
42938	ValidProtocolActionCorrespondenceMaintenanceDocument	Correspondence Generated
42939	TrainingStipendRateMaintenanceDocument	Training Stipend Rate Maintenance Document
42943	WatermarkMaintenanceDocument	Watermark Details
42948	SponsorHierarchyMaintenanceDocument	Sponsor Hierarchy
42950	CoiDisclosureEventTypeMaintenanceDocument	Coi Event Type Maintenance Document
42952	Valid Class Report Freq Maintenance Document	Valid Class Report Frequency Maintenance Document
42953	KcKrmsTermFunctionMaintenanceDocument	Krms Term Stored Function
42956	RateClassTypeMaintenanceDocument	Rate Class Type Maintenance Document
45484	TrainingLMSMaintenanceDocument	Training LMS
45486	TrainingModulesMaintenanceDocument	Training Modules
71109	FiscalPeriodMaintenanceDocument	Fiscal Period
71110	ReportsToUnitMaintenanceDocument	Reports to Unit Maintenance Document
71111	AccountNumberMaintenanceDocument	Account Number
71115	FiscalYearMaintenanceDocument	Fiscal Year
71116	StatementMaintenanceDocument	Statement Maintenance Document
71119	StatementTypeMaintenanceDocument	Statement Type Maintenance Document
71121	FinIntEntityTypeMaintenanceDocument	Financial Interest Entity Type Maintenance Document

Id	Name	Label
71123	ReportCustomAttributeMaintenanceDocument	ReportCustomAttribute Maintenance Document
71124	CustomAttributeDocumentMaintenanceDocument	Custom Attribute Document Maintenance Document
71131	ReportTypeMaintenanceDocument	ReportType Maintenance Document
71133	CustomAttributeMaintenanceDocument	Custom Attribute Maintenance Document

Maintenance Documents: Pre-Award Modules

Id	Name	Label
42706	BudgetStatusMaintenanceDocument	Budget Status
42708	NegotiationActivityTypeMaintenanceDocument	Negotiation Activity Type
42722	JobCodeMaintenanceDocument	Job Code
42723	NegotiationLocationMaintenanceDocument	Negotiation Location
42758	S2sSubmissionTypeMaintenanceDocument	Submission Type Document Type
42766	PostSubmissionStatusMaintenanceDocument	Post Submission Status Code
42767	NegotiationAssociationTypeMaintenanceDocument	Negotiation Status
42768	AppointmentTypeMaintenanceDocument	Appointment Type
42782	S2sRevisionTypeMaintenanceDocument	Revision Type Document
42783	MailTypeMaintenanceDocument	Mail Type
42806	DegreeTypeMaintenanceDocument	Degree Type

Id	Name	Label
42819	NegotiationStatusMaintenanceDocument	Negotiation Status
42849	NegotiationAgreementTypeMaintenanceDocument	Negotiation Status
42874	MailByMaintenanceDocument	Mail By
42877	BudgetCategoryMaintenanceDocument	Budget Category Maintenance Document
42898	DeadlineTypeMaintenanceDocument	Deadline Type
42929	NarrativeStatusMaintenanceDocument	Narrative Status
42930	ProposalLocationTypeMaintenanceDocument	Proposal Location Type
42932	AbstractTypeMaintenanceDocument	Abstract Type
42944	NarrativeTypeMaintenanceDocument	Narrative Type
71117	PIStatusTypeMaintenanceDocument	PI Status Type
71118	ResearchTypeMaintenanceDocument	ResearchType

Notification Documents

Id	Name	Label
2023	KualiNotification	Notification
2024	SendNotificationRequest	Send Notification Request