STREAMLYNE: EMAIL NOTIFICATION TYPES & ACTION LIST PREFERENCES

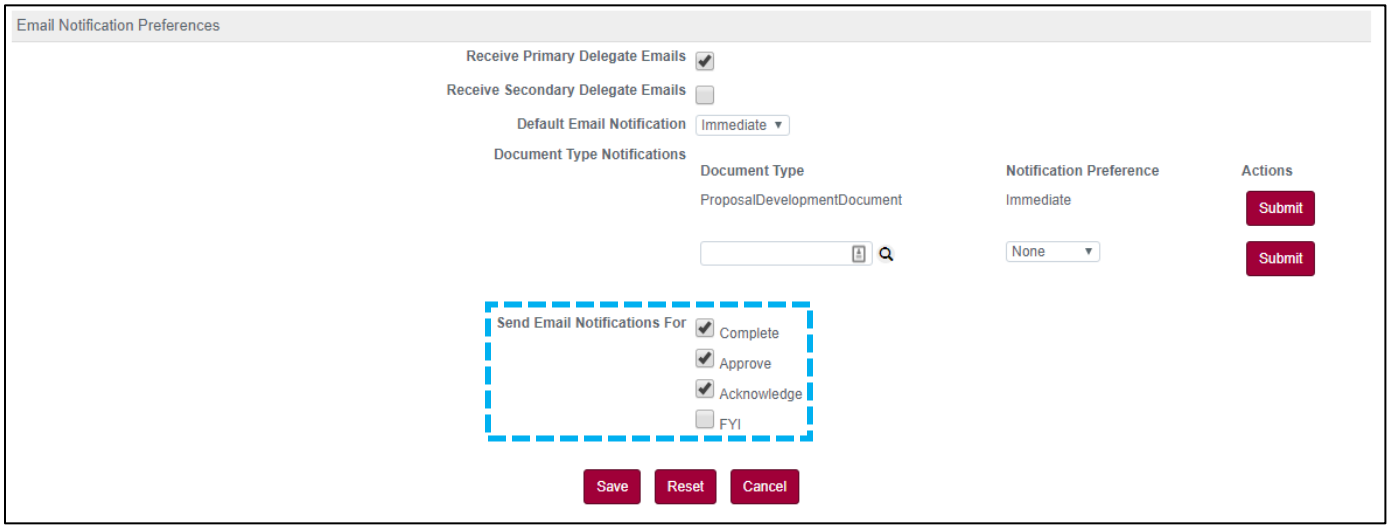
Email Notification Types	
Acknowledge ACK	This email is a notification that an item needs your acknowledgement before the routing process can be completed.
Action List	This email is a notification that an item is in your Streamlyne action list.
Approve APP	This email is a notification that an item needs your review. Upon review, you have the option to Approve, Disapprove, or Reject the document.
Complete COM	This email is a notification that you need to complete the document and submit it to begin the workflow (approval) routing process.
FYI FYI	This email is for your informational purposes only. Either of the following options will clear these messages from your Action List: 1) Within your Action List click the "Show" button to view details of the notification > click the FYI button at the bottom to clear the item from your action list, or 2) You can choose "FYI" from the "Apply Default"** drop-down menu on the far right of your Action List and scroll down to the bottom of the page and click the "Take Actions" button. This will clear away all FYI notifications currently on your Action List. ***Some users may prefer not to receive the FYI emails as you will also receive a notification from your Action List. Instructions to turn off FYI notifications are below.** **If you do not have the **FYI** option in your **Apply Default** drop-down menu, see page two for instructions on setting up that feature.

1) To adjust your email notifications, go to:
   Main Menu > Settings > User Preferences

2) Scroll down to the last section labeled, **Email Notification Preferences**.

3) Under **Send Email Notifications for**, uncheck the box for notifications you would like to stop receiving and click the **Save** button.

NOTE: If you turn off the **Approve** notifications, you will NOT be notified via email when you need to approve a document in Streamlyne.



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1) To adjust the columns you see in your Streamlyne Action List, go to:
Main Menu > Settings > User Preferences

2) The **Fields Displayed In Action List** section allows you to adjust the columns you see on your Streamlyne Action List page. Below are definitions for each field option.

Action List Fields	
Document Type (Displayed as: Type)	This field will display what type of document is in your action list. Examples: Proposal Development, IRB Protocol, Notification, etc.
Action Requested (Displayed as: Action)	Action types are: Acknowledgement (ACK), Approve (APP), Complete (COM) and FYI (FYI). Once the requested action has been completed, the document will be cleared off your Action List and can be found in your outbox.
Delegator	This will display the name of the person delegated to approve for a workflow step. (Similar to a BASIS proxy.)
Date Approved (Displayed as: Last Approved Date)	This is the date of the last approved action step for the document.
WorkGroup Request (Displayed as: Group Request)	This field displays the workflow approval group.
Clear FYI	When this feature is on, a drop-down menu (Apply Default) becomes available on the Action List screen. When you have multiple FYI notifications in your Action List you can chose FYI from the Apply Default drop-down menu then click the Take Action button at the bottom of the Action List. This clears all the FYI notifications from your Action List for the displayed page/screen.
Title	For Proposal Developments, this is the title listed in the Project Title field. For IRB Protocols, this is the information listed in the Description field.
Initiator	Initiator is the person who created the proposal development or IRB protocol.
Date Created	This is the date the proposal development or IRB protocol document was originally created. This is not equal to the date the document was submitted.
Current Route Node(s)	This field displays the current approval routing stage the document is in.
Document Route Status (Displayed as: Route Status)	Displays the current status of the document.
Use Outbox	To activate your outbox (similar to your "sent" folder for your email), check this box. To see your outbox, click the checkmark located on the toolbar on the Action List screen.