

Overview

Primary Links are associated with documents as a way to derive both search terms and user access. It is always best to link a document at the lowest level, e.g., Award-Project combination. This will assure that the right people will have access and will assist in the overall RADR performance.

More than one link can be associated with a single document. For example, if the document is backup for a cost transfer, then both Award-Project combinations associated with the cost transfer can be linked to the document. In addition, a document can be linked to more than one type of link, for example, both an Oracle Award Number and a Millennium ID.

Some links are used for search purposes only, while *Primary Links* derive additional search terms and account-level security.

Primary Links

Award Number

Definition: Oracle Award Number, aka the A in the PTA.

Derived Search Values:

- Funding Source Award Number
- GL Fund Segment
- Owning Organization (i.e., Award Organization and Project Organization)
- PI Name (i.e., Award Manager and Project Manager)
- Project Number

Security: Person must have salary-level access to the Award in Cognos. If the person has access at the Award-Project combination, then they will not be able to view the document.

Tip: If the document is specific to an Award-Project combination, link at the Award-Project instead of the Award. This will provide better security and assist in RADR performance overall.

Award - Project

Definition: Combination of both the Oracle Award Number and Project Number.

Derived Search Values:

- Award Number
- Funding Source Award Number
- GL Fund Segment
- Owning Organization (i.e., Award Organization and Project Organization)

- Project Number
- PI Name (i.e., Award Manager and Project Manager)

Security: Person must have salary-level access to the Award-Project combination in Cognos. If the person has access at the Award, then they also have access to all Award-Project combinations associated with the Award.

Award for Search Only

Definition: Oracle Award Number, aka the A in the PTA. Used when a document will not be shared with people outside of central administration. Some Award Numbers generate a lot of search terms. Access at the award level for these awards is rarely given, thus, deriving all the additional search terms adds no value and instead hinders RADR performance.

Derived Search Values:

- GL Fund Segment

Security: Person must have salary-level access to the award in Cognos. If the person has access at the Award-Project combination, then they will not be able to view the document.

GL Fund Segment

Definition: The portion of the Oracle GL Segment Combination that is associated with the funding of the account.

Derived Search Values:

- Award Number
- GL Fund Description
- Owning Organization (i.e., Award Organization and Project Organization)
- Project Number
- PI Name (i.e., Award Manager and Project Manager)

Security: Person must have salary-level access to the Award in Cognos. If the person has access at the Award-Project combination, then they will not be able to view the document.

Tip: If the document is specific to an Award-Project combination, link at the Award-Project instead of the Award. This will provide better security and assist in RADR performance overall. In addition, the GL Fund Segment will be derived from that link and still be available for searching.

GL for Search Only

Definition: The portion of the Oracle GL Segment Combination that is associated with the funding of the account. Used when a document will not be shared with people outside of central administration. Some GL Fund Segments generate a lot of search terms. Access at the award level for these awards is rarely given, thus, deriving all the additional search terms adds no value and instead hinders RADR performance.

Derived Search Values:

- Award Number
- GL Fund Description

Security: Person must have Institute-level access to access these documents.

Millennium ID

Definition: The ID for a Donor or Organization in the Millennium application used by Development and Institute Relations.

Derived Search Values:

- Donor Name

Security: No security is associated with this link. It is used for search purposes.

Source Award Number

Definition: The Funding Source Award Number associated with an Oracle Award Number.

Derived Search Values:

- Award Number
- GL Fund Description
- Owning Organization (i.e., Award Organization and Project Organization)
- Project Number
- PI Name (i.e., Award Manager and Project Manager)

Security: Person must have salary-level access to the Award in Cognos. If the person has access at the Award-Project combination, then they will not be able to view the document.

Search-only Links

The following links are for capturing additional search values only. No other *metadata* is derived from the entry of these links

CR Batch Number

Definition: The alphanumeric value associated with a Cash Receipt batch.

Cash Receipt Number

Definition: The Oracle Cash Receipt Number.

Conversion

Definition: All documents must have at least one link. Some of the documents brought in for the initial implementation of RADR did not have metadata easily associated. These documents were given a link of *Conversion* with a value of *Conversion*.

Donor Name

Definition: Derived from the primary link Millennium ID.

GL Fund Description

Definition: The description entered in Oracle for a GL Fund Segment. The GL Fund Description is derived from the primary link GL Fund Segment.

JE Name

Definition: The name entered in Oracle for a Journal Entry.

Owning Org

Definition: The HR Organization associated with either an Oracle Project or Award. Derived from the primary links Award Number, Award-Project combination, and GL Fund Segment.

PI Name

Definition: The award or project manager entered in Oracle. Derived from the primary links Award Number, Award-Project combination, and GL Fund Segment.

Project Number

Definition: An Oracle Project Number that is associated with an Award. Derived from the primary links Award Number, Award-Project combination, and GL Fund Segment.