



Quick Tips

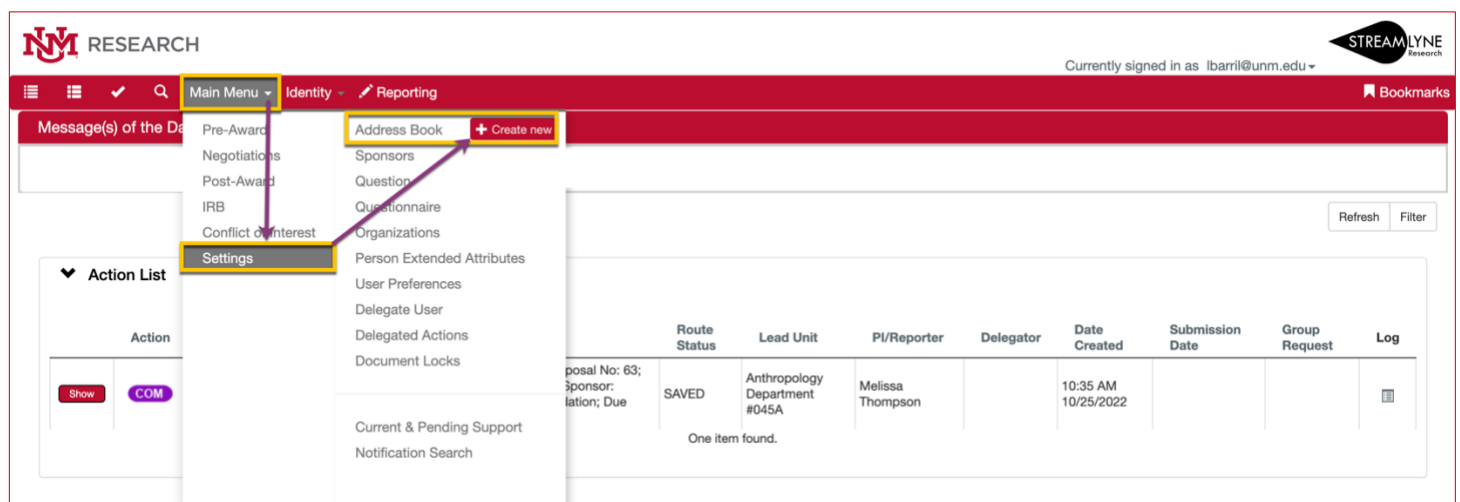
How to Add a Person or Site to the Address Book in Streamlyne

External Key Personnel and Performance Sites must be available in the Address Book before they can be added to a proposal. Once an Address Book entry has been created (by any Streamlyne user), the person will be available *immediately* and for any future proposals.

The Address Book cannot be used to add Sub Awardee Organizations or Sponsors. To add these entities, contact [OSP](mailto:osp@unm.edu) <mailto:osp@unm.edu>.

1. Before modifying the **Address Book**, perform a search to check whether an entry already exists.
2. The Address Book can be modified by any Streamlyne user and is accessible by navigating to **Main Menu > Settings > Address Book > + Create new** to add a new entry.

Hint: We suggest opening a new browser window to work on the Address Book so that you do not lose your place in the proposal.



The screenshot shows the Streamlyne interface with the 'Main Menu' dropdown open. The 'Settings' option is highlighted, and the 'Address Book + Create new' option is also highlighted. The 'Address Book' table displays the following data:

Route Status	Lead Unit	PI/Reporter	Delegator	Date Created	Submission Date	Group Request	Log
proposal No: 63; sponsor: ...; Date Created: 10:35 AM 10/25/2022	Anthropology Department #045A	Melissa Thompson		10:35 AM 10/25/2022			

One item found.

3. In the **Document Overview** panel, a **Description** is required for record keeping purposes only. Type any note, such as "Add Person X".



4. In the **Edit Address Book** panel, enter information on the Person or Performance Site you wish to add. While few fields are required, keep in mind that the information you enter will determine what information will be available to search.
- a) At minimum, the following fields should be completed to add a person:
- **Description:** type any note, such as “Add Person X”
 - **Country Code:** where the person is based
 - **First Name**
 - **Last Name**
 - **Email Address**
 - **Organization:**
 - Use **Link to Organization** to search for an organization in the database
 - If not found, free-type in the **Organization** field
 - **Owned by Unit:** By default, displays 000001 (University of New Mexico). If desired, you can link your entry to a specific Unit/Department to make it easier to search for them later.

The screenshot shows the 'Edit Address Book' form in a web browser. The 'Description' field is highlighted with a yellow box and contains the text 'Add Person X'. Below it, the 'Country Code' dropdown menu is highlighted and set to 'United States'. Further down, the 'First Name' and 'Last Name' text input fields are highlighted. Below those, the 'Link to Organization' section is highlighted, showing the 'Organization' search field. At the bottom, the 'Owned By Unit' dropdown menu is highlighted and set to '000001'. A purple arrow points from the 'Description' field down to the 'Country Code' field, and another purple arrow points from the 'Country Code' field down to the 'First Name' field.

- b) At minimum, the following fields should be completed to add a performance site:
- **Description:** type any note, such as “Add Site X”
 - **City**
 - **State** (if US site)
 - **Country Code**
 - **Organization:** Type name of site in free-text field
 - **Owned by Unit:** By default, displays 000001 (University of New Mexico). If desired, you can link your entry to a specific Unit/Department to make it easier to search for them later.



The screenshot shows the 'Add Site X' form in Streamlyne. The form is divided into sections: 'Document Overview', 'Edit Address Book', and 'Notes and Attachments'. The 'Edit Address Book' section contains various input fields for site information. Key elements highlighted with yellow boxes include: the description field containing 'Add Site X', the 'Country Code' dropdown menu set to 'United States', the 'Organization' selection field, the 'State' dropdown menu, and the 'Submit' button at the bottom right. A purple arrow originates from the description field and points down to the 'Submit' button.

5. Click **Submit** at the bottom of the page to finalize your entry.