



Maintaining Sponsor Address & Sponsor Data Records Documentation

Maintaining Sponsor Address & Sponsor Data Records

The purpose of this document is to educate Streamlyne users about the process and steps involved in manually creating and updating (configuring) Sponsor and Sponsor Address data in the system.

These configuration tasks include two main records: Address Book records and Sponsor records. Because an Address Book record must be in place for a Sponsor Address before a Sponsor record can be added to the system, the Address Book is covered first.

Understanding & Using the Address Book

The Address Book is the place to create and maintain electronic records for all person contacts and address information except employee contact information. Given this, the Address Book can contain records for the following types of contacts:

- Sponsor-related entries, which may include general Sponsor mailing addresses, and/or detailed contact information for individuals within a sponsoring organization.
- Organization-related entries, which may include subawardee mailing addresses, contact information for individuals within subawardee organizations, subawardee invoicing addresses, primary contact information for collaborating institutions, unique contact information for individuals within collaborating organizations, and physical address information for any external performance site locations.
- Your institution's non-employee entries, which may include the primary contact information for your institution, off-site performance site locations within your institution, and any additional externally facing contact information that should map to Grants.gov forms such as Authorized Organization Representative (AOR) contact information.

For the purposes of this document, we will concern ourselves with Sponsor-related entries only.


Address Book Navigation

To create a new entry

1. Choose from either navigation path depending on your permissions:
Main Menu > Settings > Address Book > +
Maintenance > Shared > Address Book > + Create New
2. Complete the required fields in the Document Overview section.
3. Enter as much or as little information as is relevant based on the field descriptions in the [Completing Address Book Fields for Sponsors](#) section.
4. Click Submit to commit the changes to the database.

To search through existing entries

1. Choose from either navigation path depending on your permissions:
Main Menu > Settings > Address Book
Maintenance > Shared > Address Book
2. Enter your search criteria and then click the Search button.
3. Click the hyperlinked Address Book ID that corresponds to the record you wish to view.

Throughout the application, you may also click the  magnifying glass to perform the same search each time an Address Book entry is called for.

To edit an existing entry

1. Choose from either navigation path depending on your permissions:
Main Menu > Settings > Address Book
Maintenance > Shared > Address Book
2. Enter your search criteria and then click the Search button.
3. Click the edit hyperlink that corresponds to the record you wish to edit.
4. Complete the required fields in the Document Overview section.
5. Enter new information for one or more fields based on the instructions in the [Completing Address Book Fields for Sponsors](#) section.
5. Click Submit to commit the changes to the database.

▼ Edit Address Book

New

Address Book Id: 100023

Check here if this record is being created in order to submit applications as an individual, and not on behalf of a company, state, local or tribal government, academia, or other type of organization:

Address Line 1:

Address Line 2:

Address Line 3:

City:

Comments:

Congressional District:

* Country Code:

County:

Delete Flag:

Email Address:

Central Email Address:

Fax Number:

First Name:

Middle Name:

Last Name:

* Organization:

* Owned By Unit:

Phone Number:

Postal Code:

Prefix:

* Sponsor Address Flag:

Sponsor Code:

State:

Suffix:

Title:

Active:

Completing Address Book Fields for Sponsors

The directions outlined here are written for new Sponsor Address entries. Follow these instructions each time you create a new Sponsor Address until you master the process.

When you are editing an existing entry, you will only need to update or add fields that are relevant to your desired edits. When this is the case, you may choose to reference only the steps that correspond to the fields you wish to change.

Step	Action
1.	Write down the Address Book ID generated for this record. You will need this information when you enter the Sponsor record.
2.	Enter the Sponsor's address information on Address Line 1 and Address Line 2 . You may use Address Line 3 if necessary, though this third line does not map to PDF forms and reports due to space constraints.
3.	Enter the City associated with the Sponsor address.
4.	If there is any internal information that should be stored with this address for other users to reference, enter this into the Comments field.
5.	Select the appropriate Country Code from the dropdown list.
6.	If you are also including Sponsor Contact information on this address card, such data associated with the primary contact within the sponsoring organization, complete these fields: Email Address, Fax Number, First Name, Last Name . Otherwise, leave these fields blank.
7.	Enter the name of the Sponsor in the Organization field.
8.	For the Owned By Unit field, click the magnifying glass to search for and select the Unit ID of the department that owns this Address Book record. Generally, the value will usually be the parent Unit in your institution's hierarchy, 000001.
9.	Enter the Phone number for this Sponsor Address as NNN-NNN-NNNN.
10.	Enter the zip code for this Sponsor Address in the Postal Code field. You may use NNNNN format or NNNNN-NNNN format.

Step	Action
11.	Set the Sponsor Address Flag to Y.
12.	<p>If you are entering a new record for a new Sponsor, you will not be able to enter the Sponsor Code yet.</p> <p>If you are editing a record, make sure the Sponsor Code field is populated with the unique identifier of the Sponsor this address is associated with.</p>
13.	Select the appropriate State from the dropdown list.
14.	Click the Submit button to commit your changes to the database.

Understanding Sponsors

In Streamlyne, Sponsor records are used to capture and maintain identifying data for the institutions or agencies that serve as your funding sources. Some Streamlyne users choose to maintain Sponsor data manually, while others choose to electronically load Sponsor records from a source system outside Streamlyne. The instructions in this section assume that Sponsors will be maintained manually.


Navigation

To create a new entry

1. Choose from either navigation path depending on your permissions:
Main Menu > Settings > Sponsors > +
Maintenance > Miscellaneous > Sponsors > + Create New
2. Complete the required fields in the Document Overview section.
3. Enter as much or as little information as is relevant based on the field descriptions in the [Completing Sponsor Fields](#) section.
4. Click Submit to commit the changes to the database.

To search through existing entries

1. Choose from either navigation path depending on your permissions:
Main Menu > Settings > Sponsors
Maintenance > Miscellaneous > Sponsors
2. Enter your search criteria and then click the Search button.
3. Click the hyperlinked Sponsor ID that corresponds to the record you wish to view.

Throughout the application, you may also click the  magnifying glass to perform the same search each time a Sponsor entry is called for.

To edit an existing entry

1. Choose from either navigation path depending on your permissions:

Main Menu > Settings > Sponsors

Maintenance > Miscellaneous > Sponsors
2. Enter your search criteria and then click the Search button.
3. Click the edit hyperlink that corresponds to the record you wish to edit.
4. Complete the required fields in the Document Overview section.
5. Enter new information for one or more fields.
6. Click Submit to commit the changes to the database.

▼ Edit Sponsor

New

Sponsor Code: 100020

Acronym:

Audit Report Sent For Fy:

CAGE Number:

* Country Code:

DODAC Number:

DUN And Bradstreet Number:

DUNS Plus Four Number:

Sponsor Reference ID:

* Owned By Unit:

Postal Code:

Address Book Id:

* Sponsor Name:

* Sponsor Type Code:

State:

Check here if this entity is a domestic subsidiary of a foreign entity:

Active:

Completing Sponsor Fields

The directions outlined here are written for new Sponsor entries. Follow these instructions each time you create a new Sponsor until you master the process.

When you are editing an existing entry, you will only need to update or add fields that are relevant to your desired edits. When this is the case, you may choose to reference only the steps that correspond to the fields you wish to change.

Step	Action
Note	If you are creating a new Sponsor record, you must first create an Address Book entry before you can initiate the Sponsor entry. If you have not done so already, return to the previous section for instructions to perform this step: Understanding & Using the Address Book .
1.	If your institution is not using auto-generated identifiers for Sponsors, enter the Sponsor Code according to your institution's naming convention. Make note of this number. You will need to return to the Address Book record to include this value.
2.	Enter the most commonly used acronym for this agency in the Acronym field. Users rely on this field for searching so care must be taken to enter the correct acronym.
3.	If you are using Streamlyne to track auditing activities for Sponsors in general, you may choose to include the fiscal year (YYYY) of the last delivered audit report in the Audit Report Sent for Fy field.
4.	Select the appropriate Country Code from the dropdown list.
5.	If your institution tracks the Commercial and Government Entity Code (CAGE Number), the Department of Defense Ammunition Code (DODAC Number), the DUN And Bradstreet Number , or the DUNS Plus Four Number , enter some or all of these in the corresponding fields for this Sponsor. Otherwise, leave some or all of these fields blank.
6.	For the Owned By Unit field, click the magnifying glass to search for and select the Unit ID of the department that owns this Address Book record. Generally, the value will usually be the parent Unit in your institution's hierarchy, 000001.

Step	Action
7.	Enter the zip code for this Sponsor in the Postal Code field. You may use NNNNNN format or NNNNN-NNNN format.
8.	<p>Enter the Address Book ID for the Address Book record you created or edited before initiating the Sponsor record.</p> <p>If a value is already populated here, you may leave this intact or search for and select a different Address Book ID to change the primary address associated with this Sponsor.</p>
9.	Enter the full name of the agency or organization in the Sponsor Name field.
10.	Choose the correct Sponsor Type Code from the dropdown list.
11.	Select the appropriate State from the dropdown list.
12.	Click the Submit button to commit your changes to the database.
13.	Check the box appropriately where it says Check here if this entity is a domestic subsidiary of a foreign entity.
Note	If you just completed entering a new Sponsor, return to the Address Book record to update the Sponsor Code to the Address Book record. If you don't remember the navigation, refer back to the Address Book Navigation section.