

STREAMLYNE TIP SHEET

REQUESTING AN EXTERNAL PERSON

REQUESTING AN EXTERNAL PERSON IN STREAMLYNE

Requesting an External Person to be added to Streamlyne

When a Co-PI or Key Person from another institution needs to be added to a proposal, in order to be identified in the submission (S2S), submit a request using the **New External Person** link, in the top right hand corner of the [OSPA Home page](#).

The screenshot shows the Streamlyne website interface. On the left is a navigation menu with links for Home, Streamlyne, Proposals/Pre-Award, and Awards/Post-Award. The main content area displays a welcome message from the Office of Sponsored Programs Administration at Iowa State University, along with a section for 'Our Mission'. On the right, there is a 'Streamlyne Request Forms' section with a list of options: New Sponsor, New Organization (Subrecipient), Update Organization (Subrecipient) Address, **New External Person** (highlighted with a red box), and New Credit Split for RU F&A Distribution.

Be prepared with the following information:

Full Name	Full Address, including 9-digit Zip Code
Title	Country
Prefix	Phone Number
Organization name	Email
Department	Proposal Due Date

Adding the External Person in Streamlyne

In the Streamlyne PD, once you have confirmation that this person has been added, you can locate them and add them to the PD by selecting Key Personnel > External Address Book ID. Select the magnifying glass to search.

The screenshot shows the 'Key Personnel' selection interface. On the left is a sidebar menu with options: Key Personnel, Special Review, Custom Data, Abstracts & Attachments, and Questions. The main area shows a dropdown menu for 'Key Personnel' with a search icon. Below the dropdown are two radio buttons: 'Internal User Name' and 'External Address Book ID'. The 'External Address Book ID' option is selected, and a search input field with a magnifying glass icon is visible below it.

Search for the person with any criteria. Use wildcards (% or *) to help identify more options.

The screenshot shows the 'Non-Organizational Address Book Lookup' form. It contains various input fields for searching for a person, including Address Book Id, Sponsor, Address Line 2, City, Country Code, State, Email Address, First Name, Middle Name, Owned By Unit, Postal Code, Sponsor Address Flag, Title, Sponsor Code, Address Line 1, Address Line 3, Comments, County, Delete Flag, Fax Number, Last Name (with a red box around the input field containing '%Smith%'), Organization, Phone Number, Prefix, and Suffix.

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Select return value for the correct person. Then when you are returned to the Key personnel screen, identify the correct proposal role and select Add.

Return Value	Address Book Id	Last Name	First Name	Middle Name	Title	Organization	Address Line 1	Address Line 2	Address Line 3	City	State	Country Code	Postal Code	County	Email Address
return value	106872	Smith			Associate Member	DONALD DANFORTH PLANT SCIENCE CENTER	Donald Danforth Plant Science Center, B-03016	975 N Warson Rd		St Louis	MO	USA	63132-2918	St Louis	

* Person	Unit	* Proposal Role	Multiple PI	
Add: Tessa Burch-Smith 314-587-1083 TBurch-Smith@danforthcenter.org	Iowa State University	Co-Investigator	<input checked="" type="checkbox"/>	<input type="button" value="Add"/>

After adding this person, **they must be assigned a unit**. Expand the profile and select Unit Details. One external unit is designated for external persons. You can select 000000 as the unit number and select Add, or search for *external* after navigating to the search fields, by selecting the magnifying glass under Unit Name.

Unit Name		* Unit Number	Actions
Add: (select) 🔍		000000	<input type="button" value="Add"/>

Once their unit is added, you will find this person and their unit in the Combined Credit Split category. The person's splits will all be zero, but their unit must equal 100%. As shown below.

Combined Credit Split			
	Financial	Incentive	Contribution
Smith	0.00	0.00	0.00
000000 - EXTERNAL KEY PERSONNEL (NON-ISU)	100.00	100.00	100.00
Unit Total:	100.00	100.00	100.00

Important! Before completing this section, check that the Key Person you've added has a complete 9-digit Postal Code and, if this is an eRA Commons/NIH submission, check that an eRA Commons User Name has been entered. These are entered in the **Person Details** section. These specific data points may cause errors, if not complete at the time of S2S submission.

Person Details	
<input type="button" value="Show"/>	