



## Creating a New Address Book Entry in Kuali Coeus (KC)

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You may create a new address book entry to add a performance site, delivery address, or non-(IU) employee that does not already exist in the KC system.

#### STEP 1: ACCESS THE ADDRESS TABLE BY CLICKING THE MAGNIFYING GLASS ICON FROM EITHER OF THESE LOCATIONS:

- Proposal Tab > Organization/Location panel > Performance Site Locations subpanel
- Proposal Tab > Delivery Info panel > Mailing Name & Address field
- Key Personnel tab > Non-employee Search field
- Budget Document > Personnel tab > Non-employee Search field

#### STEP 2: CONDUCT A SEARCH TO DETERMINE IF THE ENTRY ALREADY EXISTS

Enter the appropriate search criteria. Be sure to use wildcards (\*) to refine your search and limit the entries returned. If your search does not return the information you need, a message will appear directly below the search criteria that reads "Can't find what you are looking for? Click [here](#) to add a new entry, or contact the System Administrator to add one."

#### STEP 3: OPEN A NEW ADDRESS ENTRY

Click the "[here](#)" link from the message referenced above. A blank Address Book entry form opens on your screen.

#### STEP 4: CREATE A NEW ENTRY

Some fields are mandatory; others are optional. You must complete the following fields:

- Description – briefly describe the new entry in your own words
- Organization – the official name of the organization, agency, or business (Indiana University for your laboratory, office location, etc.)
- Owned by Unit – put your IU Unit here (ex: IN-HEMO, BL-CHEM)
- Sponsor Address Flag – enter "N"
- Active – check this box; you must check this in order for a search to return the entry
- Enter the address in the Address line 1 (& 2, 3, as needed)
- Enter city and state (choose from the drop down list)

All remaining fields are optional. However, complete as many additional fields as you need at this time.

#### STEP 5: PROOF YOUR INFORMATION

Check your information carefully before submitting. You cannot edit an entry once it has been submitted. You will need to either contact the System Administrator to edit it for you or you will have to create another new entry.

#### STEP 6: CLICK THE SUBMIT BUTTON

If successfully created, the message "Document was successfully submitted" will be displayed.

#### STEP 7: CLICK THE CLOSE BUTTON TO CLOSE OUT OF THE ADDRESS SCREEN

The new entry will be available immediately.

#### STEP 8: CONDUCT A NEW SEARCH AND RETURN YOUR NEW ADDRESS ENTRY

Now that you have created your entry, you must conduct another Search to retrieve the entry and populate the KC field.

- Return to the Address Look up screen.
- Search for your newly created entry.
- Return the value.