

### Adding a New Agency from the Dashboard

**Purpose:** Specific roles as listed below have permissions to add a new agency from the RMS *Dashboard*. After being approved by Research Accounting, new agencies created in RMS are uploaded into PeopleSoft the following day.

**Audience:** RSO/RF

#### ADD NEW AGENCY

**Step 1:**

From the Dashboard, click **Add New Content** button

**Step 2:**

Select Agency from the menu. The *New Agency* window opens.

**Step 3:**

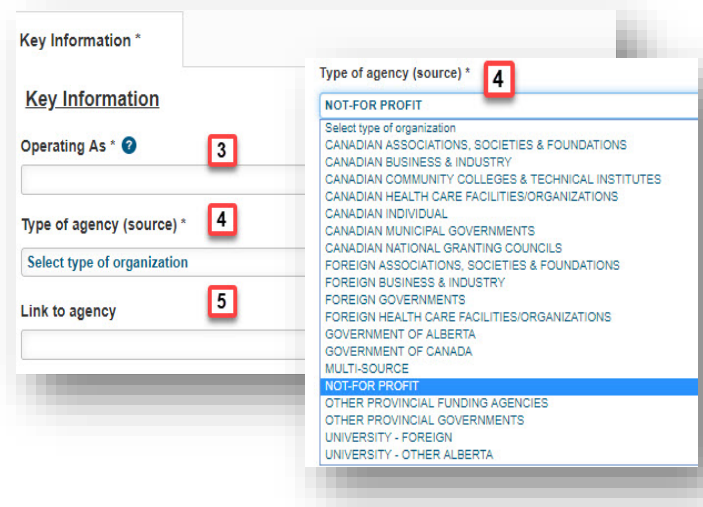
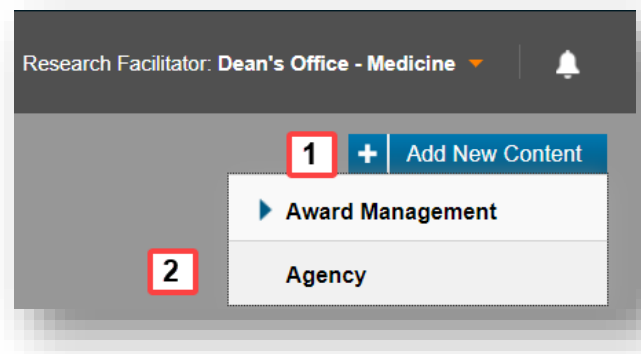
Enter the agency's name into the **Operating as** field. This is name that is used to conduct business and maybe an abbreviated form of the legal name.

**Step 4:**

Click the dropdown arrow in the **Type of agency (source)** field to select a type.

**Step 5:**

Enter the website URL for the agency in the **Link to Agency** field.



### Step 6:

Enter **Alternate Name** if there is one (e.g., different language, short form (other than the acronym)).

### Step 7:

Enter the agency's full legal name.

### Step 8:

If the agency has changed its identity, click the **+** icon to select its previous operating name from the database.

### Step 9:

Click the **+** icon below **Country** and either enter the name of the country, or click the **Az** icon to search for the country where the agency is based.

### Step 10:

Add any relevant information regarding the agency into the **Notes** field.

### Step 11:

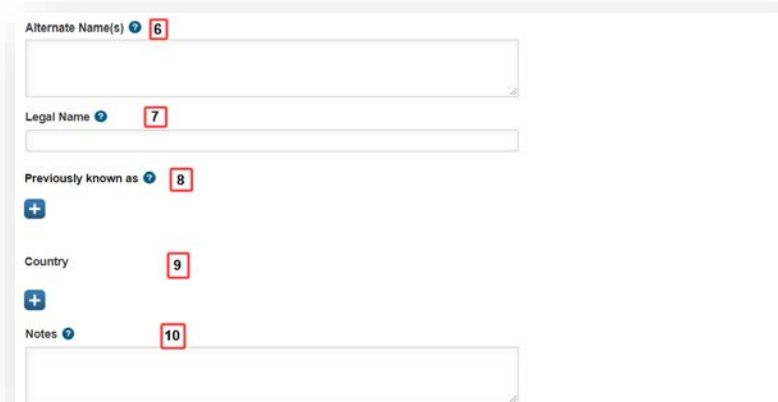
Click **Save & Progress** to save the agency.

### Step 12:

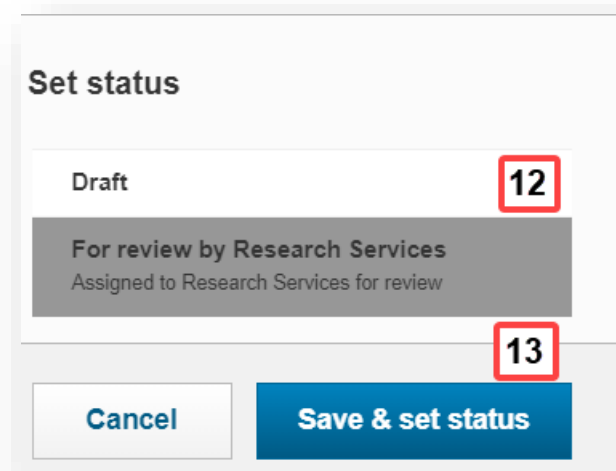
Select Draft if there are additional details to enter. Otherwise, select For Review by Research Services.

### Step 13:

Click **Save & Set Status**. Agency displays in RSO **Things to do>New agencies ready for review**.



A screenshot of a web form for adding a new agency. The form has several fields with numbered callouts in red boxes: 6 points to the 'Alternate Name(s)' field; 7 points to the 'Legal Name' field; 8 points to the 'Previously known as' field which has a blue '+' icon; 9 points to the 'Country' field which has a blue '+' icon and a small 'Az' icon; 10 points to the 'Notes' field.



A screenshot of a 'Set status' dialog box. It has a title 'Set status' and two radio button options: 'Draft' (callout 12) and 'For review by Research Services' (callout 13). The 'For review by Research Services' option is selected and has a grey background with the text 'Assigned to Research Services for review'. At the bottom, there are two buttons: 'Cancel' and 'Save & set status'.