Adding New Agency from Dashboard

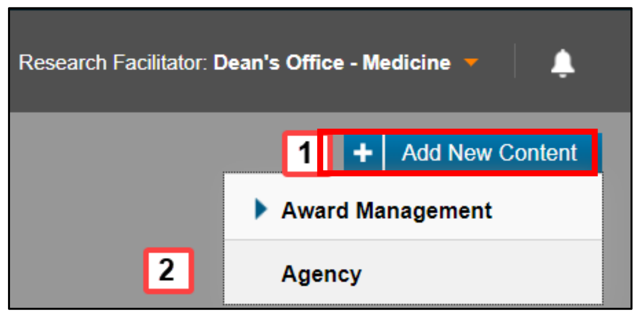
Quick Reference Guide

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

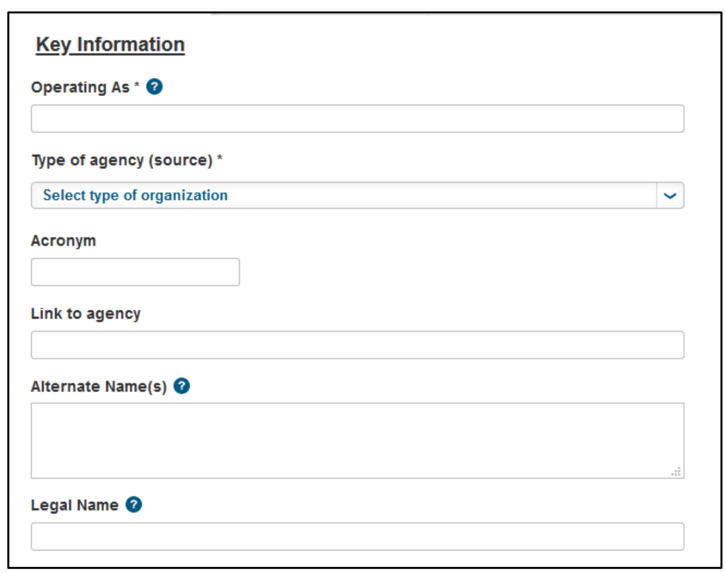
ADD NEW AGENCY



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:
If applicable, enter a commonly used acronym for the agency.

Step 6:
Enter the website URL for the agency in the **Link to Agency** field.

Step 7:
Enter **Alternate Name** if there is one (e.g., different language, short form (other than the acronym).

Step 8:
Enter the agency's full legal name.

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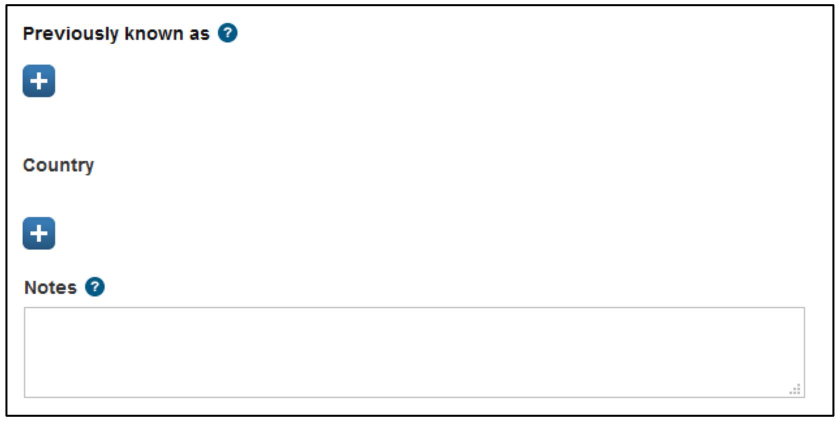
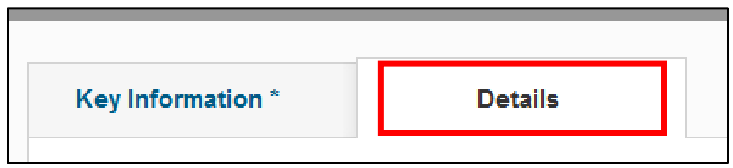
Step 9:
If the agency has changed its identity, click the + icon to select its previous operating name from the database.



Step 10:
Click the + icon below **Country** and either enter the name of the country, or click the A-Z icon to search for the country where the agency is based.

Step 11:
Add any relevant information regarding the agency into the **Notes** field.

Step 12:
If known, add any additional details on the **Details** tab.



Step 13:
Click **Save & Progress** to save the agency.

Step 13:
Select Draft if there are additional details to enter. Otherwise, select <u>For Review by Research Services</u>.

Step 13:
Click **Save & Set Status**. Agency displays in RSO **Things to do>New agencies ready for review.**