

Purpose:


The Research Services Office enters the majority of funding opportunities into the Funding Calendar which become accessible in RMS. In the event that a Researcher identifies a new funding opportunity and can't find it in the funding calendar or RMS database, a new one is created in RMS. This typically occurs for small, one-off funding opportunities.

Funding opportunities created within RMS are reviewed and approved by Research Services in parallel with academic approvals. RSO also determines whether or not the opportunities should be entered into the funding calendar. If the opportunities are small, one-off opportunities RSO may elect to only list them in and not the calendar.

Audience:

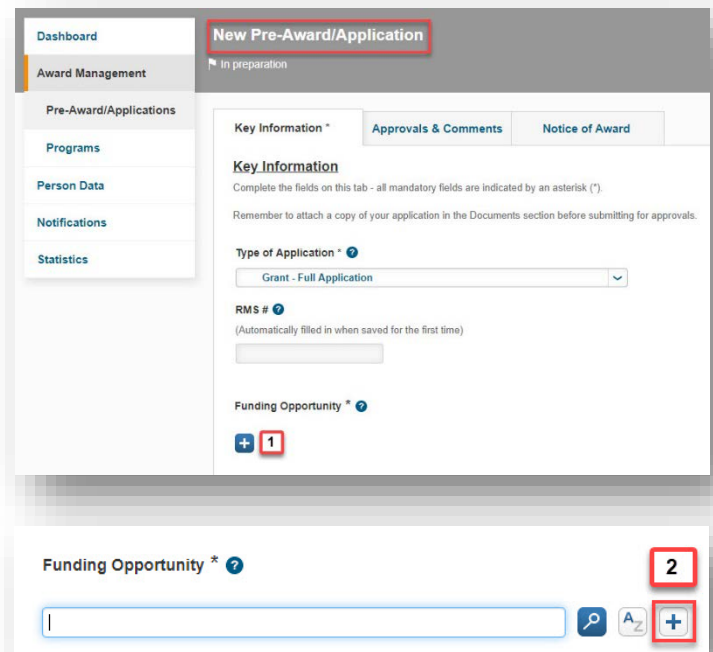
Researcher (Principal Investigator)

Step 1:

Click the  icon below the **Funding Opportunity** section. The text entry field will display.

Step 2:

Click the  icon beside the **Funding Opportunity entry** field. The *New Funding Opportunity* window opens.



The screenshot shows the 'New Pre-Award/Application' form in the RMS system. The 'Funding Opportunity' field is highlighted with a red box and a '1' in a red box. Below it, a search bar for 'Funding Opportunity' is highlighted with a red box and a '2' in a red box.



Step 3:

Enter the funding opportunity name into the **Program Name** field.

ADD EXISTING AGENCY RELATED TO NEW FUNDING OPPORTUNITY

***IMPORTANT NOTE:** In this release of RMS, only existing agencies can be selected from the A-Z list and added into the Agency field in the New Funding Opportunity page. For the time being, after saving the new funding opportunity the record returns to the main page where the agency can be added.*

Step 1:

Click the **+** icon below **Funding Agency/Sponsor**. The search/add option (keyword, A-Z, +) icons display.

Step 2:

Click the **A-Z** icon.

Step 3:

Click the **+** icon to select an existing agency from the list. Details are populated into the agency fields.

Step 4:

Enter the **Link to Call** (website URL to agency) if one exists and the field does not populate the link.

Step 5:

Enter the **Program Deadline**.

Step 6:

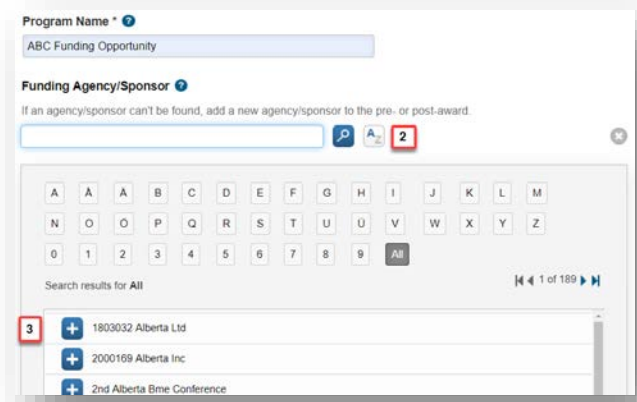
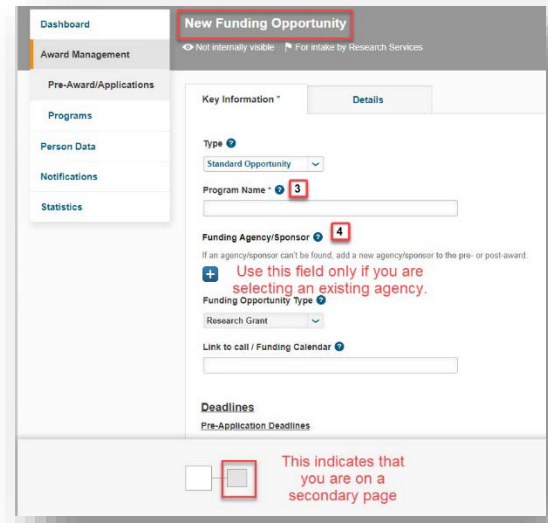
Click **Save & Set Status**.

Step 7:

Select For Intake by Research Services.

Step 8:


Click **Save & Set Status**.






ADD NEW AGENCY TO FUNDING OPPORTUNITY

Step 1:

Click the  icon below **Funding Agency/Sponsor**. The search options display.

Step 2:

Click the  icon to add a new agency

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 any relevant details into the **Notes** field.

Step 7:

Click **Save & Set Status**.

Step 8:

Select For Review by Research Services.

Step 9:

Click **Save & Set Status**.

