


Managing Research Organizations - Include v1.1.3


You must identify each organization uniquely and assign it a research role.

**Information on Tab Labels**

The Organization Details page displays all details about the organization provided to date. The tab labels in the Assign Organizational Roles section at the bottom of the page display the number of each role already associated with the organization that you are curating (if applicable). The letter "P" beside the role name on each of the tabbed pages indicates that at least one role is pending curation.

How to Manage Research Organizations

1. Navigate to the record of interest.
2. In the **Action** column for a given organization, click **Curate**.
3. In the **Assign Organization Roles** section toward the bottom of the **Organization Details** page, click the **RO** (Research Organization(s)) tab. The RO page displays the research roles currently assigned to the organization (if applicable).

**You can sort the records**

Click the column heading once to sort the records in ascending order. An arrow head indicates whether the sort order is descending or ascending. Click the column heading again to reverse the sort order.

Assign Organizational Roles

HCF (1)

RO (1) *P*

Oversight Committee (1)

Identified Org (1)

Org Contact (2)

ID 	<u>Research Organization Name</u>	<u>Research Organization Type</u>	<u>Funding Mechanism</u>	<u>Role Status</u>	<u>Status Date</u>	Action
9556234	Mayo Clinic Scottsdale- Phoenix			PENDING	2009-11-25	 Edit

One item found.

 Add Research Organization

4. Follow one of the options in the table below to continue assigning roles:
Options for assigning roles to an organization

If there are...	And...	Do this
No research organization role records displayed	You want to add a role	Proceed to the next step.
One or more organization role records displayed	The information for them is correct	Proceed with other aspects of the organization curation.
One or more organization role records displayed	The information for them is incorrect	In the Action column for the record you want to modify, click Edit , and proceed to the table below .

5. To add a role, click **Add Research Organization**.
The Create Research Organization page appears.

Create Research Organization

Research Organization Information

Organization Information

Organization ID: 8665 **Status:** ACTIVE **Status Date:** 2008-12-30

Organization Name:
University of Ottawa Heart Institute

Research Organization Role Information

Research Organization Name:

Research Organization Type:

Role Status:

Aliases

Alias:

[Add](#)

6. Select or enter the appropriate information in the text fields and drop-down lists. Fields are described in the following table.

Field Label	Description/Instructions
Research Organization Name	Enter the organization's name.
Research Organization Type	Select the type of role to assign. Depending on the type you select, you may be required to provide funding information.
Role Status	Select the curation status of the organization in its current role.
Aliases	Enter alternate names for the organization. Click Add after you enter each alternate name.



It is not possible to create or update a Research Organization to the ACTIVE state.

7. In the **Address Information** section, click **Add Postal Address**, and follow the instructions in [Entering Address Information](#).

8. Click **Save**.

The information appears in the Address Information section on the Create Research Organization page.

Create Research Organization

Research Organization Information

Organization Information

Organization ID: Status: Status Date:

235963 ACTIVE 2012-03-29

Organization Name:

University of Iowa

Research Organization Role Information

Research Organization Name:

Research Organization Type:

--Select a Type--

Role Status:

PENDING

Aliases

Alias:

[Add](#)

Address Information

Address 1

Country:

United States

Address Line 1:

2222 Old Highway

Address Line 2:

218 S

City:

Iowa City

State or Province: Postal Code:

IA

52242



Edit



Remove



Add Postal Address

9. Do one of the following to continue:
- To change the information in the address section, click **Edit**.
 - or -
 - To delete the address information, click **Remove**.
 - or -
 - To add another address, click **Add Postal Address**.
10. Complete the remaining **Contact Information** fields.



Remember to click **Add** after you complete each of the contact information fields.

11. Click **Save**, then click **Return to Organization Details**.