

Portfolio Settings

Portfolio Settings: Agencies

Agencies refers to any entity involved in the realization of a project. Agencies created at the **Portfolio** level are made available to pick from at the Project level.

From the Portfolio Settings module, select **Agencies** from the horizontal navigation bar.

The screenshot shows the DELTA PROJECT PORTFOLIO interface. The top navigation bar includes 'Log Frame', 'Locations', 'Agencies' (highlighted with a red box), 'Stakeholders', 'Funding Sources', 'Financing', 'Budget Categories', 'Units', 'KPI Disaggregation', 'Flag', and 'Alerts'. The 'Agencies' tab is active, displaying a table with columns: NAME, SHORT NAME, ADDRESS, CITY, TELEPH ONE, FAX, EMAIL, WEBSITE, and a final column with edit and delete icons. The table contains three rows of agency data. A '+ Add' button is located at the top right of the table area. The left sidebar shows navigation options: Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The bottom status bar indicates 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

NAME	SHORT NAME	ADDRESS	CITY	TELEPH ONE	FAX	EMAIL	WEBSITE	
Planning Institute of Kenya	Planning Institute of Kenya	Narja Road 150	Nairobi					
Project management unit	Project management unit	2890 Blv St Michael	Nairobi					
United Agency for International Development	USAID	1300 Pennsylvania Ave NW.	Washington, DC					

To **create an agency**, click the +Add button at top right. The Implementing Agencies popup window will appear.

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Implementing Agencies



Name *

Short Name

Address

City

Country *

Telephone

Fax

Email

Website

Two fields are mandatory: **Name** and **Country**. The remaining fields are optional, but we recommend as a best practice to enter as much information as is available for easy reference. Entering a short name is strongly suggested.

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Enter the information and click the checkmark in the popup window title bar when you're done. The new agency will appear on the screen.

To **edit an agency**, click its Edit icon. Make your changes, and click the checkmark in the popup window to save your work and return to the Agencies screen.

To **delete an agency**, click its Delete icon, and confirm the deletion. **IMPORTANT:** deleting an agency at the Portfolio level will also remove it from all the projects in the portfolio which use that agency.

Agencies can also be [created at the Project level](#).

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