



# Agent Designation is Moving to Gateway

Effective April 16, 2012, the agent designation functionality will move from EMMA® Dataport to Gateway. The benefits of moving this functionality to Gateway are:

- Improve the efficiency of the agent designation process
- Provide a single place to manage agent designation for all MSRB programs
- Eliminate the need to grant the agent control of the CUSIP group after designating the agent

Below is an overview of how a user will access the agent designation functionality in Gateway. For users with organization accounts, only the Master Account Administer can manage agent designation process in Gateway. You can read more in the “MSRB Gateway User Manual for Issuers, Obligated Persons and Agents”, available on-line April 16<sup>th</sup>, 2012.

From the MSRB Gateway Main Menu expand the link “Agent Relationship Management” and click the “Manage Agent Relationships” link.

**MSRB Gateway Main Menu (UAT2)**

Welcome to MSRB Gateway! Your User Account has the following Access Rights:

(Click on a section to expand)

- [+] Account and Organization Management**  
*Manage profile information for your User Account or for your organization.*
- [-] Agent Relationship Management**  
*Invite and approve agent invitations to/from organizations.*
  - > Manage Agent Relationships**  
*Manage your organization's relationships with other organizations.*
- [+] Registrant Information Forms**  
*Submit forms to provide information about your organization.*
- [-] Market Transparency Systems**  
*Access MSRB systems to submit documents and data related to municipal market activity and political contributions.*
  - > EMMA Dataport**  
*Submit documents and information to EMMA.*

**My Profile** Edit

User ID:	TTALLY
Role:	Master Account Administrator
User Name:	TESTING TALLY
Organization Name:	taylor one
MSRB ID:	P000161
Email Address:	ohamilton@msrb.org
	<a href="#">Change Password</a>

From the “Manage Agent Relationships” menu, users can designate agents, manage the relationships, or make a request to act as an agent.

**Manage Agent Relationships**

Use the following menu options to designate agents to make submissions on your behalf and approve requests from others to act as your agent.

- Active relationships: (18)
- Organizations you have requested to act as your agent: (9)
- Organizations offering to act as your agent: (2)
- Designate an organization to act as your agent

Use the following menu options to offer to make submissions on behalf of another organization and approve requests from others to make submissions on their behalf.

- Active Relationships: (27)
- Organizations requesting that you act as their agent: (2)
- Organizations for which you have offered to act as an agent: (1)
- Offer to serve as an agent for another organization

[Return to Main Menu](#)

If you have questions, please contact MSRB Support at (703) 797-6668.