The Dashboard tab is your home base when you log into UT Research Management Suite. The Create button just beneath the Dashboard tab is where you can launch an agreement request.

My Inbox displays a sortable list of all items awaiting your action to move them forward in the workflow. My Reviews displays items awaiting Ancillary Review, if applicable. Recently Viewed, located beneath the Create button, provides quick access to the records where you have most recently been active.

You can also select the Agreements tab next to Dashboard to open the Agreements Workspace (more about this below).

The Agreements Workspace is the management hub for all of your non-funded agreements. You click the Agreements tab to the right of the Dashboard tab to arrive here. From this area, you can launch an agreement request using the Create Agreement button at left.

The remainder of the workspace displays all your agreements records in sortable lists, tabbed according to their current state of review/activation (Unassigned, New, etc.).

The Export button to the right allows you to move any of these record lists to a csv file.

Reports and Help Center materials related to Agreements can be found under the sub-tabs on the second tier of the top menu bar.

For more information, visit the Frequently Asked Questions page on our website: research.utexas.edu/eraproject/FAQs

If you didn't find an answer to your question, want to make a suggestion, or need to schedule training, email us at era@austin.utexas.edu.
Roles

**Agreement Creator**
The departmental end user who initiates the agreement request by clicking Create Agreement. Typically, a PI or administrative staff. Assigned automatically based upon institutional position/title.

**Agreement Manager**
Principal Investigator (PI) of record for Agreement. Selected from a pulldown menu in the agreement request SmartForm.

**Record Owner**
Central staff (OSP or OIE) contracts team specialist assigned to review and process Agreement. Assigned after submission.

State

**Pre-Submission**
Smartform is in progress or finished. Submit not yet clicked.

**Unassigned**
Agreement is with central staff for review. Owner not yet assigned.

**Clarification Requested**
Central staff need more information to assign or finalize Agreement.

**In Review (Internal or External)**
Owner assigned. Agreement being negotiated or processed by UT or external parties. Signers not added.

**Signing (Language Finalized; Routing/Out for Signature)**
Agreement routing for UT or external signature. Activate not yet clicked.

Communication

Create and view Correspondence To-Do’s or history items logged by you or other users.

History

View actions taken, notifications sent, or other changes to record, with associated timestamp and user. Click to view details.

Contacts

View name, email, and phone details for record’s key contacts.

Snapshots

View (and revert to) prior states of Agreement once submitted.

Related Projects

View records linked via Manage Relationships activity.

Buttons

**Edit/View Agreement**
Make updates to the agreement record information or use the Compare function to view changes.

**Printer Version**
Provides a read-only scrollable view of the agreement record data.

**View All Correspondence**
Provides functionality for documenting any communications that occur outside the system (phone calls, emails, etc.).

Tabs

**Communication**

**History**

**Contacts**

**Snapshots**

**Related Projects**

Activities

**Submit**
Click the Submit button to forward your finished agreement request for central staff review and Owner assignment.

**Manage Ancillary Reviews**
Request review by another party within UT (e.g. EHS, OTC, etc.). You may also send to another UT employee or office before you submit your request for central staff review.

**Discard**
Archive record and remove it from New Agreements tab. This does not delete the record. However, it cannot be routed for review. It can only be viewed or copied.

**Copy Agreement**
Create new record by duplicating any Agreement (in any State). Link other Agreement records.

**Withdraw**
Return Agreement to Pre-Submission state.

**Contact Owner**
Contact central staff assigned to review and process record.

**Assign PI Proxies**
Designate another user to act as PI.