Frequently Asked Questions

General

1. How do I access UT Research Management Suite?
   Visit https://agreements.research.utexas.edu/ to log in with your University of Texas EID and password. You will be required to complete duo authentication to gain access. If you are unable to login, visit https://research.utexas.edu/era/home to request access.

2. What is a UT EID? How do I get a UT EID?
   A UT EID is an online account at The University of Texas at Austin. Anyone who manages personal online information with the university must have one. An upgraded UT EID means that The University of Texas at Austin has seen physical proof of your identity (such as a driver's license or passport) and that you have signed a form giving your UT EID legal signature authority. For information on how to get a UT EID, find your existing UT EID, or manage your UT EID account, see UT EID Self-Service Tools.

3. What is DUO and how do I use it?
   Refer to the frequently asked questions and help videos on the ITS Duo Self Help page for more information. You can also contact the UT Service Desk or call 512-475-9400.

4. Is UT Research Management Suite available on a mobile device?
   Yes! Your mobile device will support access to UT Research Management Suite on most major browsers. Currently, there is not a mobile app for the system, but we continue to work with our development partner to provide for the best possible user experience and will work with them to implement a mobile app in the future.

5. Where do I report a problem with the system?
   Use the Get in Touch button on the UT Research Management Suite Project website to report system problems. You can also send an email to era@austin.utexas.edu.

Agreements Module

1. When should I start using the Agreements module?
   The UT Research Management Suite Agreements module will launch in Spring of 2020. Once you receive training, begin using the system to submit your agreement requests. Beginning May 15th, all new Material Transfer Agreement requests must be submitted through the Agreements module. All other non-funded research agreement types must be submitted through the Agreements module beginning June 1st.

2. Can I still call and email my central office reviewers to submit an agreement request?
   You may still contact your reviewer for guidance regarding your submission. However, beginning June 1st, you will be asked to submit all new agreement requests in the Agreements Module.

3. How can I schedule initial and/or follow-up training?
   Please visit https://research.utexas.edu/eraproject/contact/ to schedule training.

4. Which agreement types are supported in the module?
   All non-funded research agreement requests should be submitted in the Agreements module, including: Material Transfers, Data Use Agreements and Licenses, Non-Disclosures, Memoranda of Understanding, Master Agreements, Export Control Plans, Teaming Agreements, and Allocation of Rights.

5. How will my role be assigned in the system?
   UT Research Management Suite integrates with the UT Enterprise Directory, Workday HR, and the DEFINE Department System to create profiles for all UT employees that will grant access to users and define their roles within the system as either a PI, a departmental coordinator, or study staff.

6. Can I assign a proxy on my behalf to submit an agreement?
   End users with PI status may delegate proxy status to another user to submit agreement requests on their behalf. Click Assign PI Proxies in the activity section of the Record Workspace. This will open a space where you can select another user to complete the submission.
7. How do I create an agreement request?
   There are a couple of ways you can begin the process of creating an agreement request:
   a. When you log in to the UT Research Management Suite, you land on your Personal Workspace. Directly beneath the Dashboard tab is a Create button. Simply click on this button to launch the Agreement SmartForms (questionnaire) and begin answering the questions. The forms adapt as you move through the process depending on the answers you provide.
   b. You can also click on the Agreements tab immediately to the right of the Dashboard tab near the top of the Personal Workspace. Click the Create Agreements button near the top left of the page to launch the Agreement SmartForms and begin answering the questions.

8. I don’t see the Contracting Party name in the pulldown menu. How do I add that information to my submission?
   A free text box is located directly beneath the populated list of catalogued UT contracting parties. Add an entry in this space if you cannot locate it in the pulldown list and you will be able to submit your agreement request. A central office staff person will review the entry and add it to the catalogued UT Austin list of contracting parties for future actions.

9. I have completed the agreement SmartForms in the system. How do I submit it for central office review?
   Once you have finished completing the questions in the agreement SmartForms, the system will run a validation check and you will be asked to acknowledge that you have completed the submission request with accurate responses. After the acknowledgement, your record will be in a pre-submission state. At this point it is awaiting further action by you, the creator. You may hold it in this state if you are waiting for additional information to add to the forms or a suitable date in your calendar to forward it in the review process. To move the record forward you will need to click on Submit in the activity section of the Record Workspace.

10. How do I make changes to an agreement request after I have submitted it for review?
    After submitting an agreement request, you will need to withdraw it in order to make changes. Click Withdraw in the activity section of the Record Workspace. An agreement request can be withdrawn at any point up until it has been sent out for signature. However, once a reviewer has been assigned, please contact the reviewer to explain any changes you need to make, so they can return it to you via the Request Clarification action which will maintain your place in the review process.

11. How can I track the progress of my agreement request once I’ve submitted it for review?
    The Agreement Record Workspace offers two visual cues regarding the progress of your agreement in the review workflow. The orange-colored State Indicator is located in the top left quadrant of the agreement record. This provides a quick visual key to let you know precisely where your request is in the review workflow, e.g. Language Finalized, Out for Signature, External Review, etc. Directly to the right of the State Indicator, the Workflow Map offers a high-level overview of the routing workflow, providing a visual key that shows where the request is at any given point.

12. Will the system notify me when I need to take an action?
    When your submission is assigned a central office reviewer you will be notified by email. Additionally, when a reviewer requests clarification about your submission or sends the finalized contract for you to sign, you will receive email notifications with links directing you to take action.

13. I received an email requesting clarification on an item in my submission. What do I do?
    Click on the link in the email notification which takes you directly to the agreement record. Select the History tab directly beneath the Workflow Map. Click on Clarification Requested at the top of the History Activity Column. Read the instructions provided here by your central office reviewer and open any associated attachments. Return to the agreement record workspace and click the Edit Agreement button on the left-hand side of the page to make the requested changes to your submission. Click on Submit Changes in the activity section of the Record Workspace to return your submission to the reviewer.

14. How do I sign an agreement?
    The Agreements Module integrates with UT Austin’s DocuSign account. You will receive a DocuSign notification email when you need to sign a finalized contract. However, wet signatures are still allowable as needed.

15. I no longer need the agreement that I requested. What do I do?
    At any point up until the agreement is signed and becomes active, you make click Discard in the activity section of the Record Workspace to remove the agreement from the review workflow. Your request to discard the agreement
prevents you from submitting again. However, it will always continue to exist as a discarded record in the Archive tab of the Agreements Workspace where it can be referenced and copied for future action.

16. Where can I find a list of all my agreements?
In the Agreements Workspace you can easily keep track of all of your agreement submissions. Depending upon their current state, they are sorted into the following categories: All Agreements (every agreement regardless of state), Unassigned (awaiting central office assignment to a reviewer), New (created but not yet submitted), In Progress (under review by central office staff), Active (signed and fully executed), Evergreen (containing evergreen renewal clause), Archived (discarded and expired). Additionally, the Suite acts as a document repository for all finalized agreements, preserving activated, modified, and expired contacts in perpetuity.

You can easily search for an agreement by selecting the Filter by category and entering % before your key search term in the search bar. For example, if you want to search for an agreement with the Short Title NDA with Lockheed, you can Filter by Name and enter %Lockheed in the search bar and everything with Lockheed in the Short Title will display in your search results.

17. Can I clone a submission so I don’t have to start the process from the beginning each time?
You can clone any agreement by clicking Copy Agreement in the activity section in the Record Workspace. Rename your copy as prompted and then travel to the All Agreements tab of the Agreements Workspace to locate the new record. Make any necessary changes using the Edit Agreement function and submit for review when you are ready to begin the review workflow.

18. How do I make changes to agreements that are signed and active?
Once an agreement has been signed and activated, all changes must be initiated through an amendment request. To launch an amendment, click Create Amendment in the activity section of the Record Workspace and add comments in the text box describing any changes you need to make. Next, open the History tab in the Record Workspace and click the Amendment link beneath the Amendment Created entry in the Activity column. This will take you to the amendment record. Click Edit Amendment to make changes to the agreement record. Click Submit in the activity section of the Record Workspace to launch the routing workflow.