Contract Repository User Manual

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For further information or to update this document contact:
Research Office Research Systems Team at Research.Information@unisa.edu.au

Important Links and Contacts

- MyRM Link
- Research Contracts Webpage Link
- Research Request Form
- Research Systems Team contact: research.information@unisa.edu.au
- Research Contracts Team contact: research.contracts@unisa.edu.au

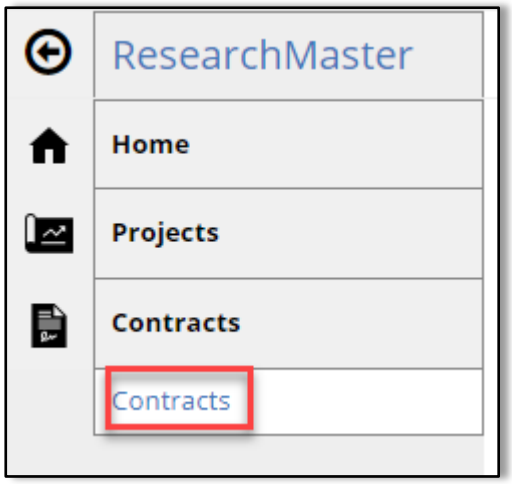
Stage 1: Create a Contract Record when a contract request is received

Step 1 Log into MyRM

- Log into MyRM using the link below with your university credential

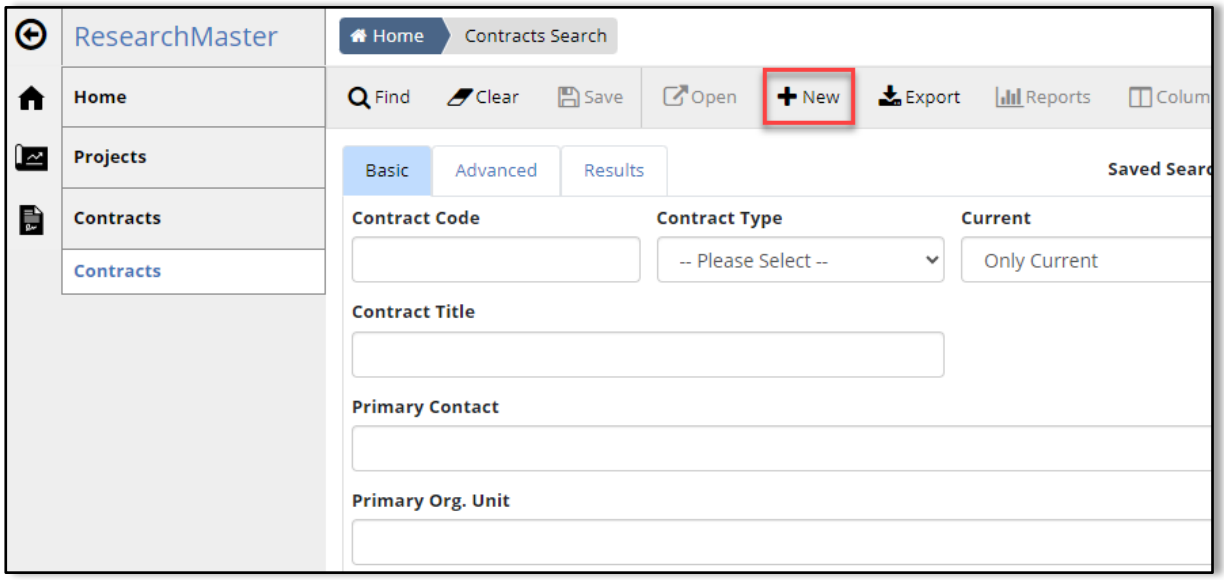
Step 2 Navigate to Contracts Module

- After logging in, Click on “Contracts” under the “Contracts” heading on the left-hand menu

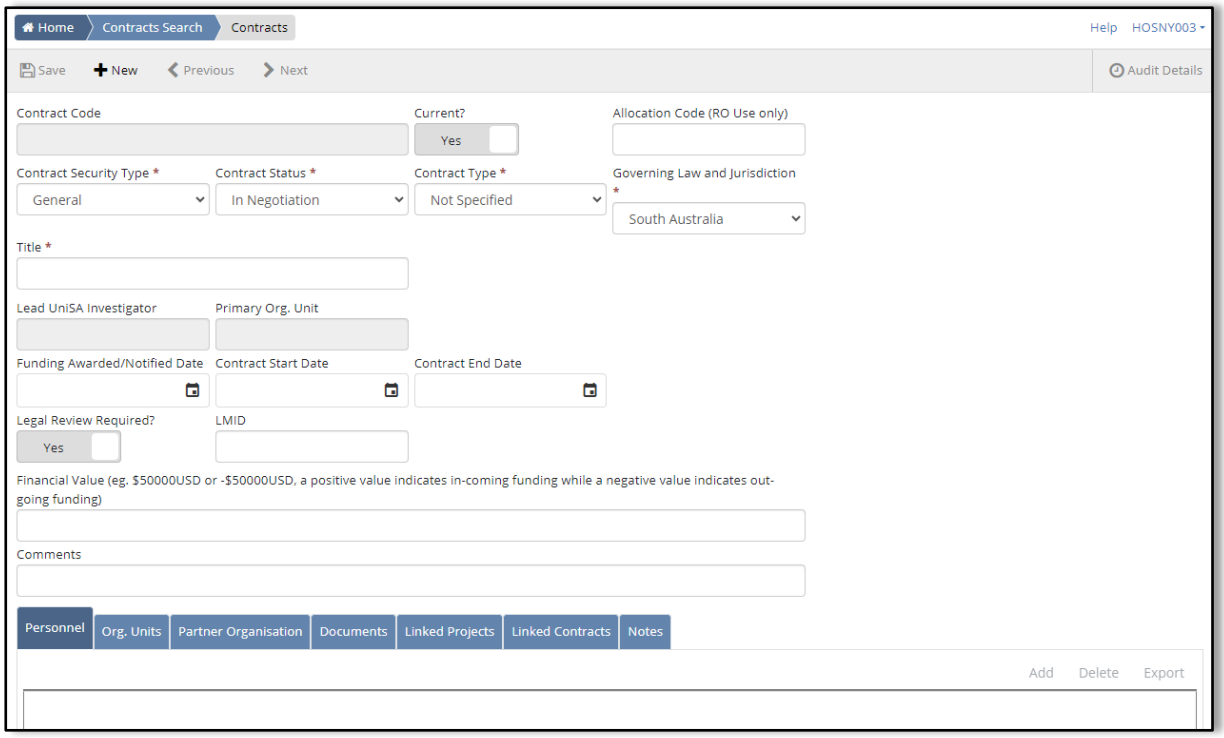


Step 3 Create a New Contract

- Click on "New" to create a new contract.

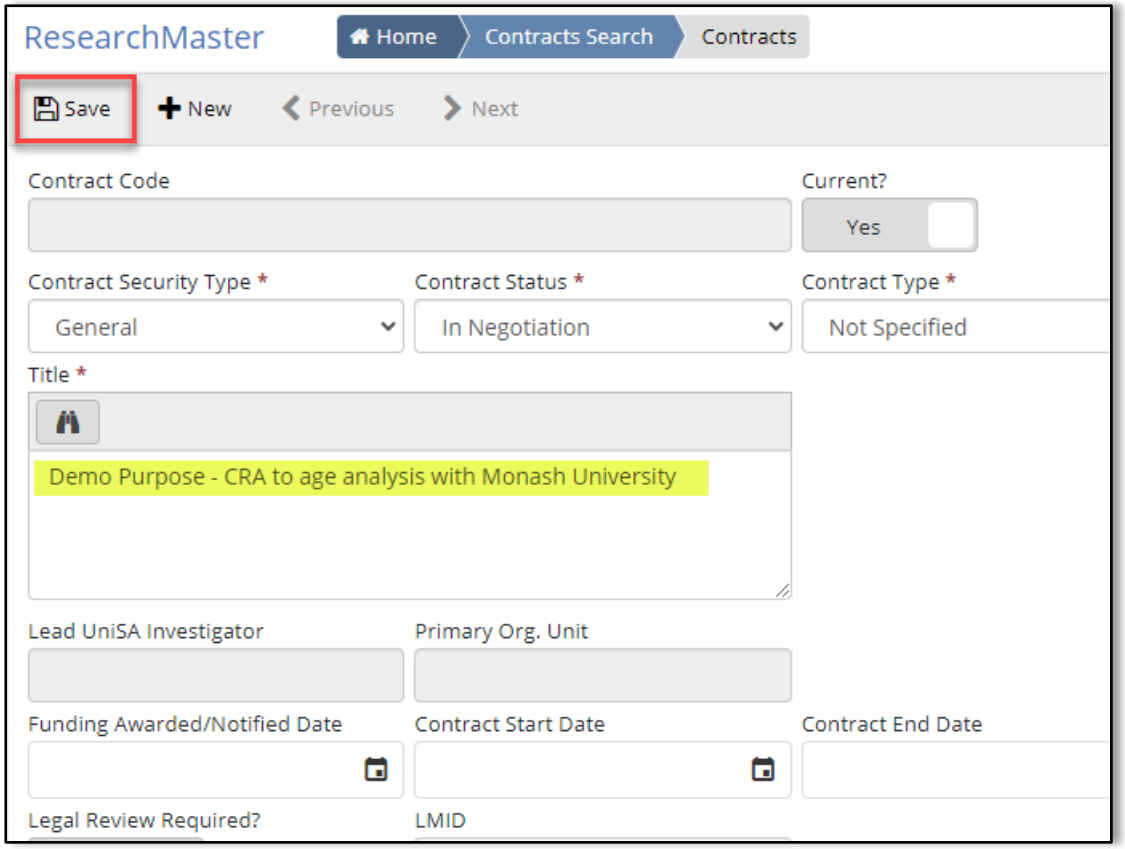


Result: A new Contract page appears

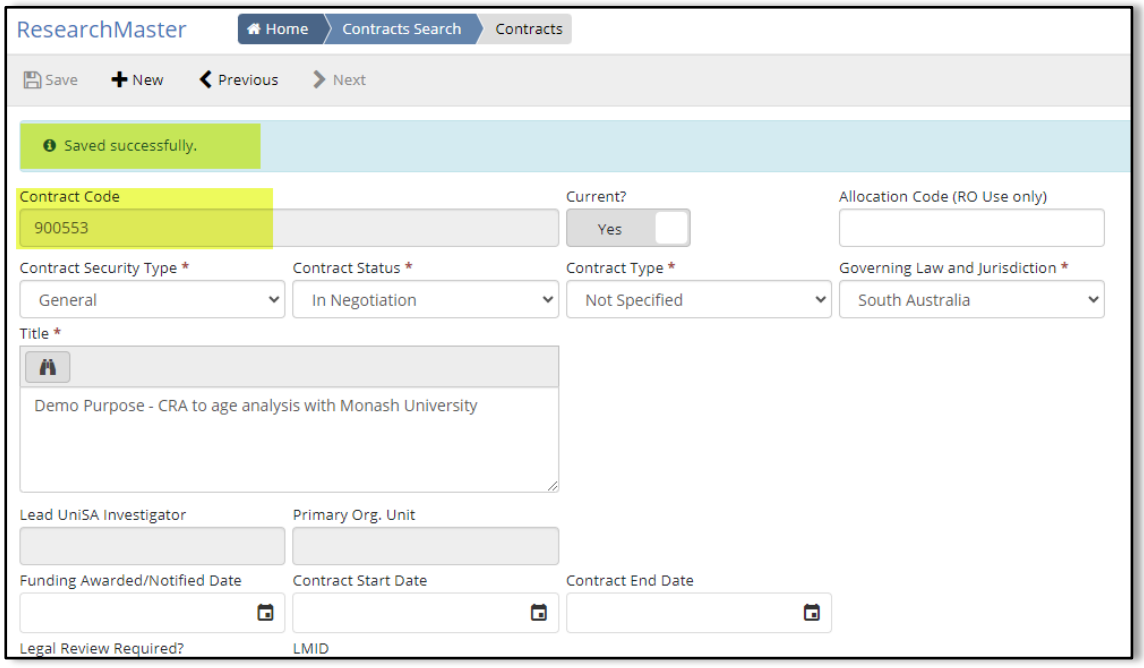

Home
Contracts Search
Contracts
Help
HOSNY003
Save
New
Previous
Next
Audit Details
Contract Code
Current?
Yes
Allocation Code (RO Use only)
Contract Security Type *
General
Contract Status *
In Negotiation
Contract Type *
Not Specified
Governing Law and Jurisdiction *
South Australia
Title *
Lead UniSA Investigator
Primary Org. Unit
Funding Awarded/Notified Date
Contract Start Date
Contract End Date
Legal Review Required?
Yes
LMID
Financial Value (eg. $50000USD or -$50000USD, a positive value indicates in-coming funding while a negative value indicates out-going funding)
Comments
Personnel
Org. Units
Partner Organisation
Documents
Linked Projects
Linked Contracts
Notes
Add
Delete
Export

Step 4 Enter the Title and Save

1) Enter the tile of the contract or the title of the project if the contract is associated with an existing research project/Expression of Interest form
2) Click “Save”



Result: The Contract is saved, and the Contract Code is generated.



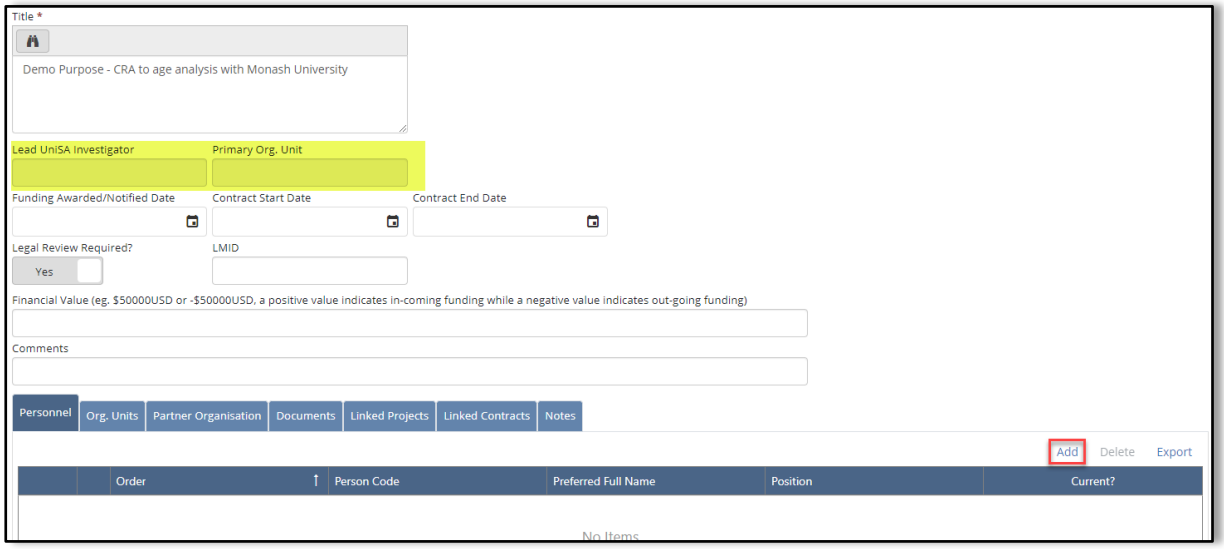
Step 5 Enter Lead UniSA Investigator and their Primary Org.Unit

Note: the Lead UniSA Investigator field is used to capture the lead researcher that is listed on the contract. However, the Lead UniSA Investigator and the Primary Org. Unit fields are always grayed out and you cannot directly into these two fields.

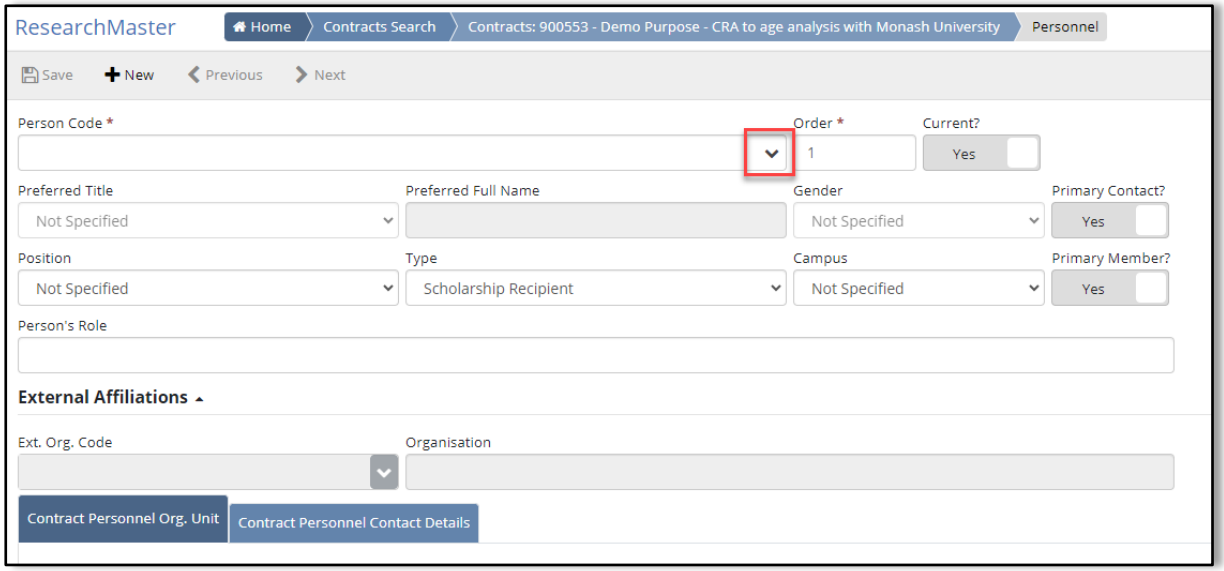
Follow these steps to populate them:

1) Under the "Personnel" tab, click "Add" at the far right

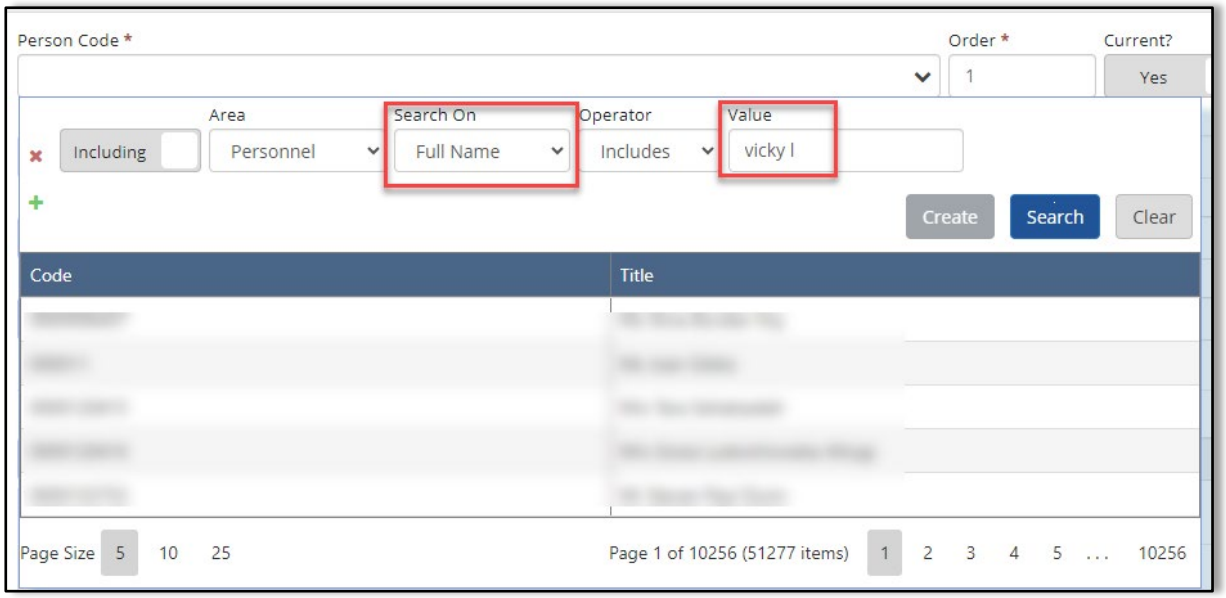
Note: if the "Add" button is not activated, Click the "Save" button on the top to activate the "Add" button



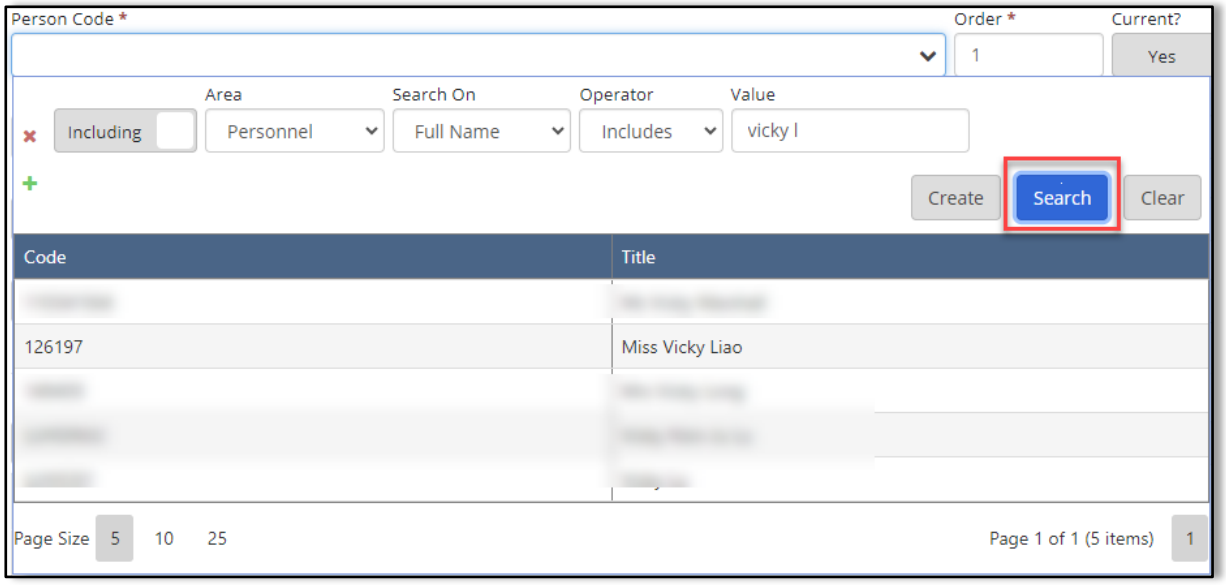
2) Use the "Person Code" field to search for the lead researcher by clicking the adjacent arrow.



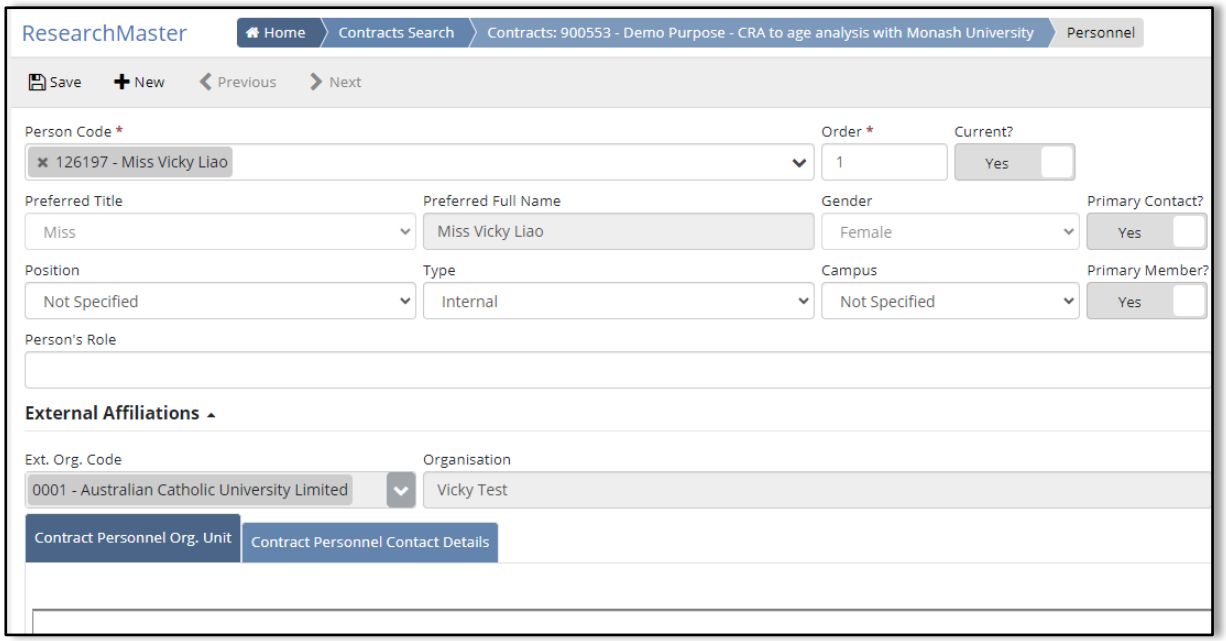
3) Change the "Search On" dropdown list to "**Full Name"** and enter the part or full name of the lead researcher



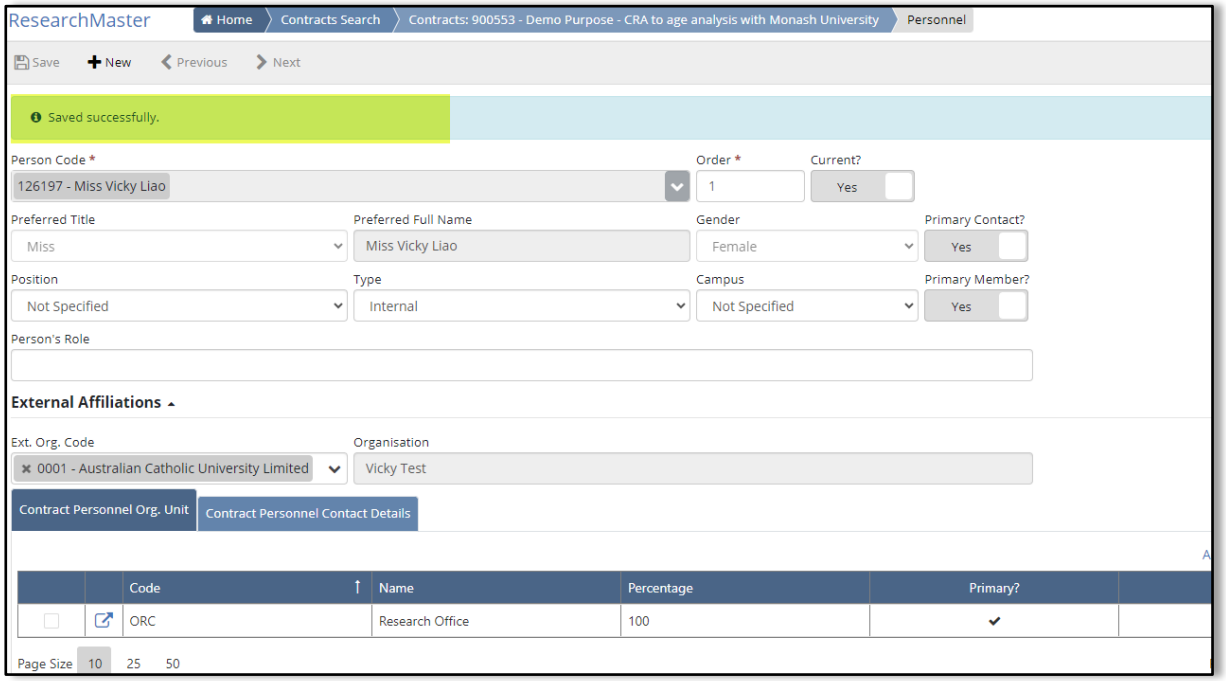
4) Click Search and select the appropriate researcher



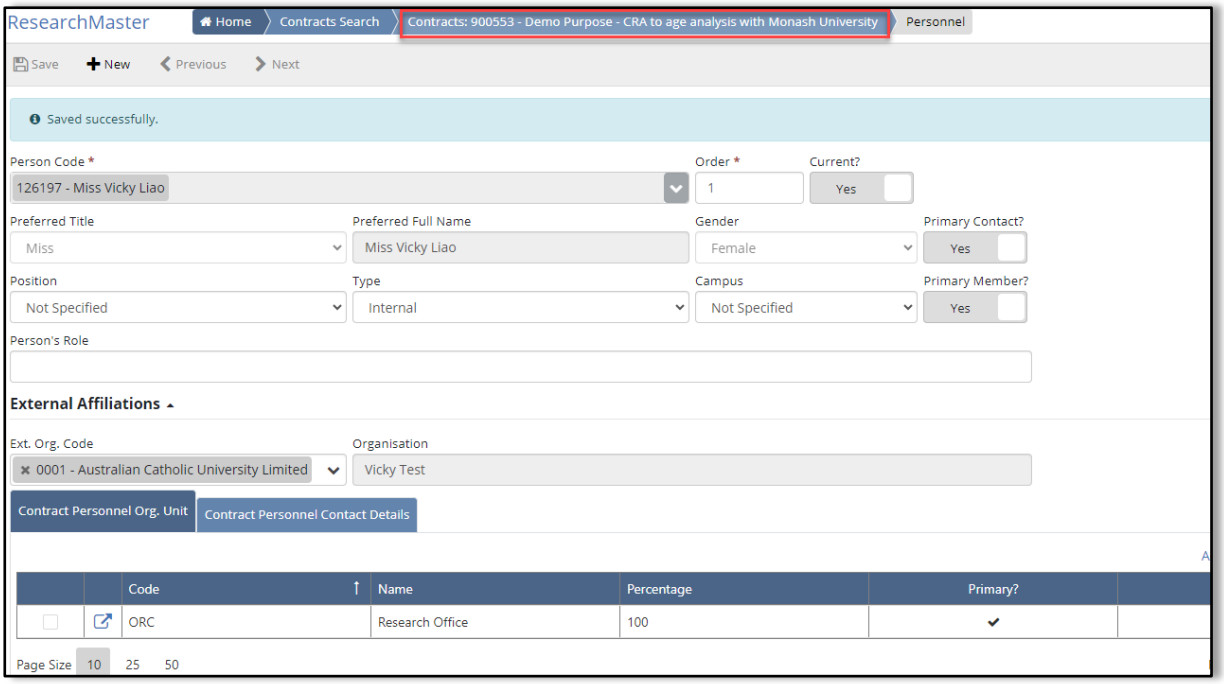
Result: the selected researcher information has populated the fields in the personnel page



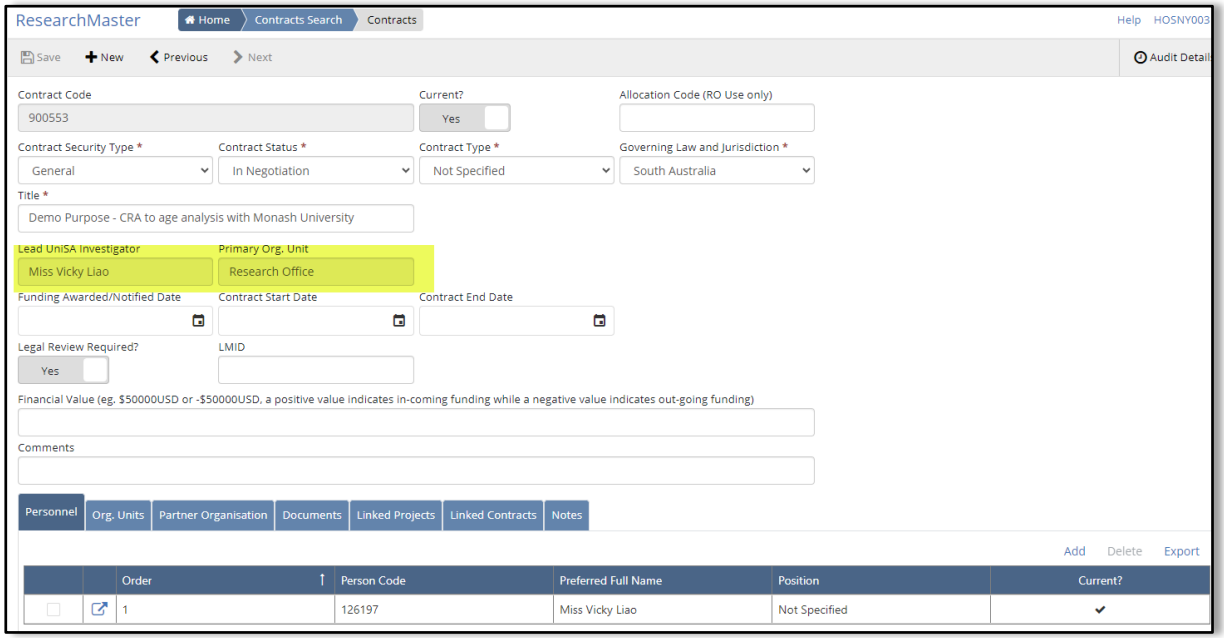
5) Click “Save”



6) Return to the previous page using the breadcrumb trail – Click the part that starts with Contract:900553)



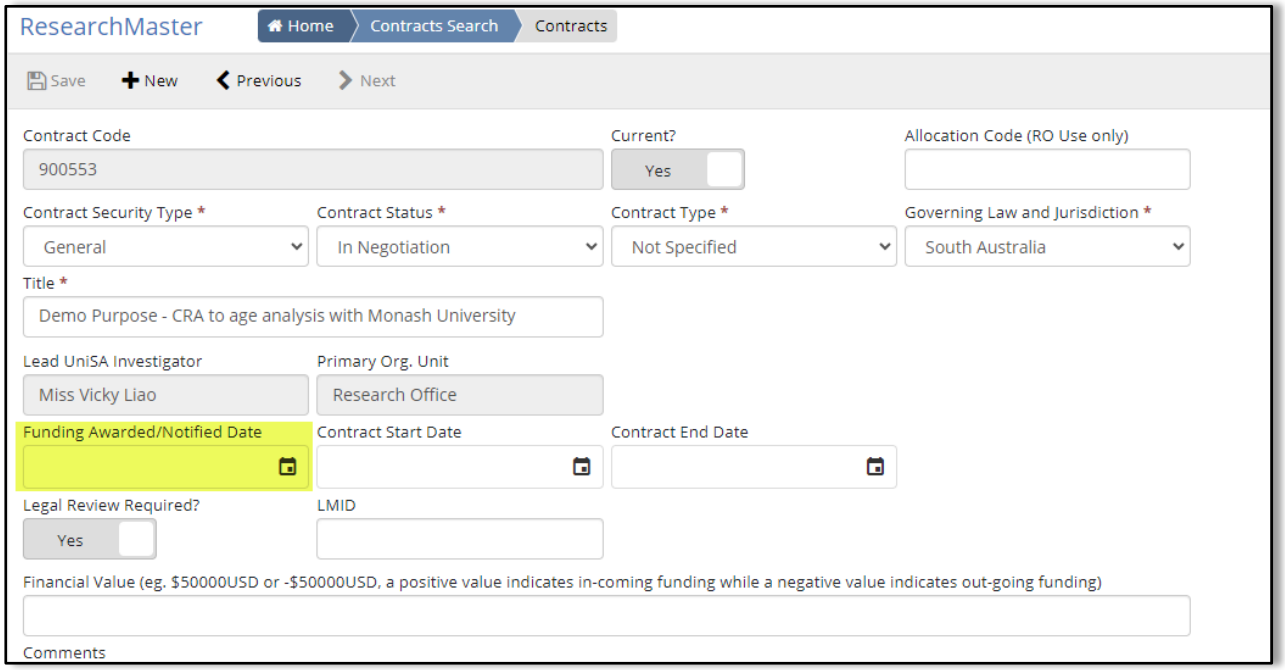
Result: The Lead UniSA Investigator and the Primary Org. Unit fields have been populated



Note: Only the lead researcher is required If multiple researchers are listed on the contract

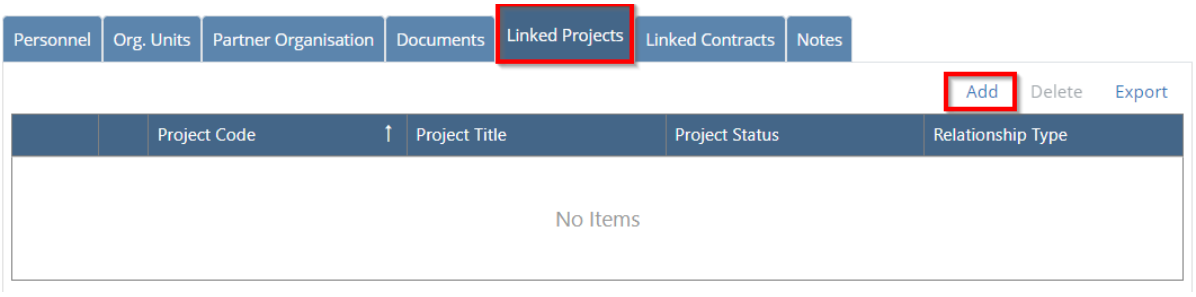
Step 6 Enter Funding Awarded/Notified Date if Related to a Grant

- Enter this date If this contract is related to a sponsor research or contract research. The date should indicate when the contract was officially awarded. If the exact award date is not clear, enter the date when you were notified the contract was awarded.

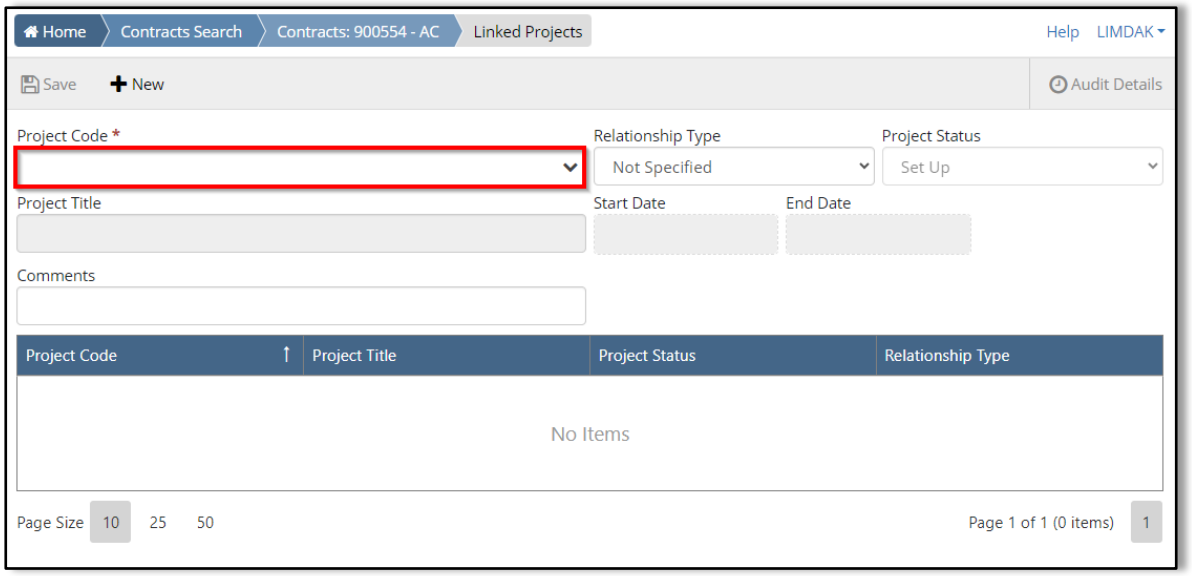


Step 7 Enter the Linked Project if Associated with an Existing Research Project

1) Under the "Linked Project" tab, click "Add" at the far right.

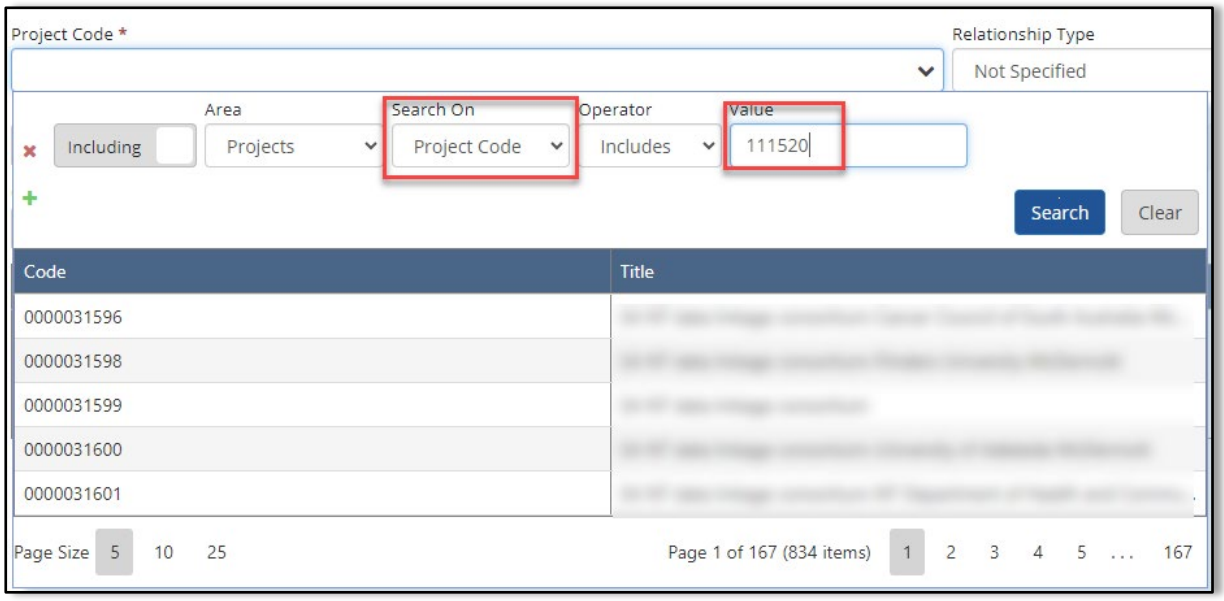


2) Use the "Project Code" field to search for an existing research project by clicking the adjacent arrow.

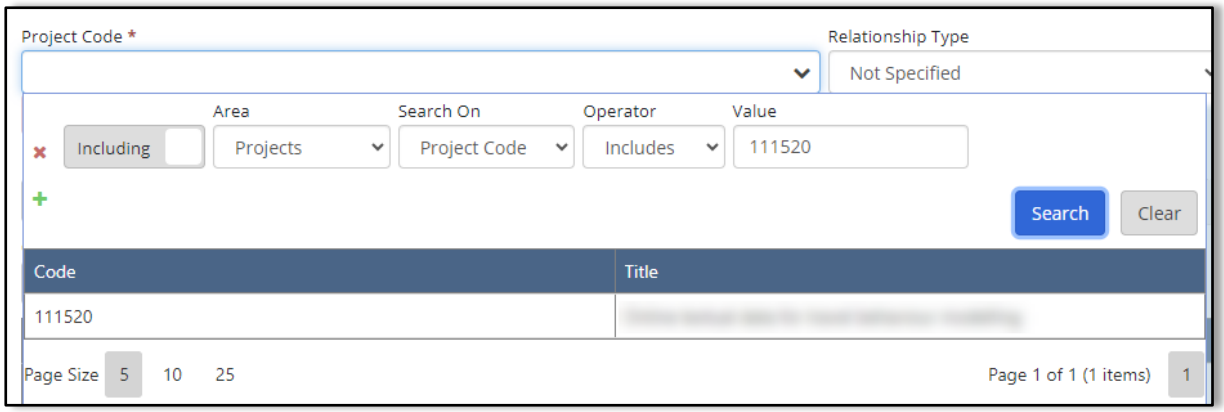


3) Change the "Search On" dropdown list to "**Project Code"** and enter the project code

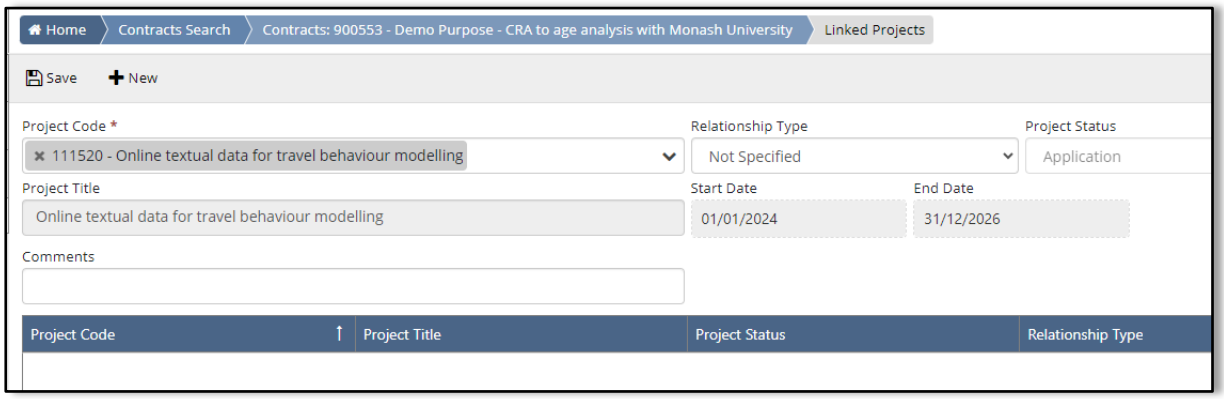
Note: you can search for the title of the project by choosing the "Project Title" in the "Search On" dropdown list



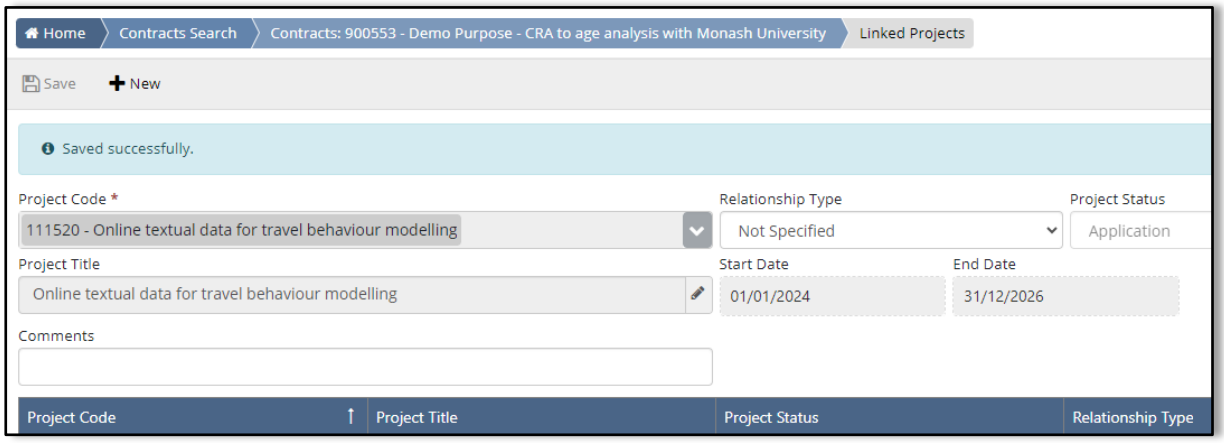
4) Click "Search" and select the appropriate project



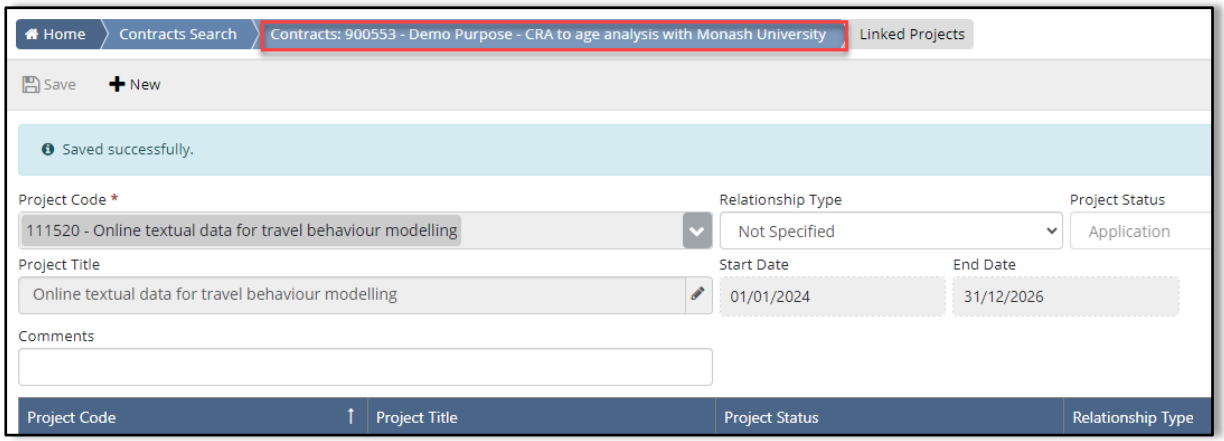
Result: the selected project information has populated the fields in the linked project page



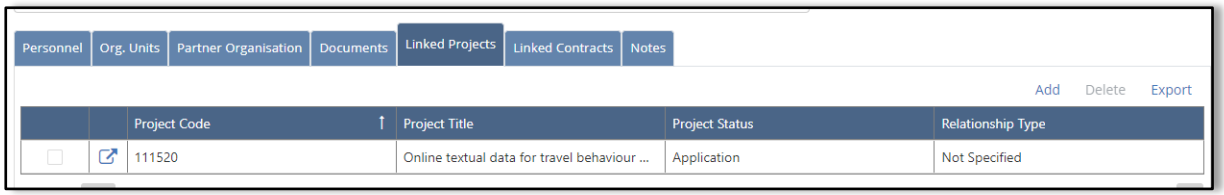
5) Click “Save”



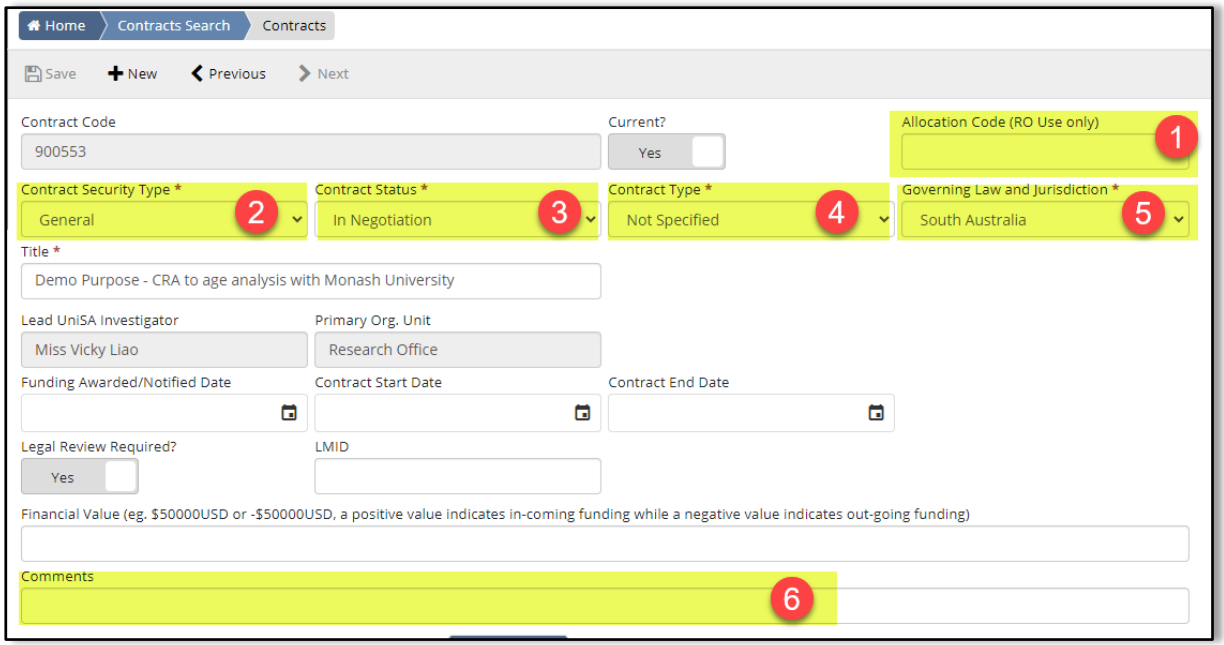
6) Return to the previous page using the breadcrumb trail – Click the part that starts with Contract:900553)



Result: The Linked Project record has been listed under the Linked Project tab



Step 8 Enter Non-Mandatory Information if Available



1. Allocation Code: this field is used to enter the allocation code of the staff member who are working on the contract, so far it is only used by the research office, but this field is useful when you are creating a contract record on behalf of another staff member who are working on the contract, you wish to record this staff member. if you wish to use this field, please contact Research Systems Team at research.information@unisa.edu.au to register an allocation code.

2. Contract Access Security: this field defines the level of security of the contract, it is either General or High Sensitive, if High Sensitive is selected, only people has been granted with this level of access will be able to view the contract record.
3. Contract Status: this field indicates where the contract is at, it is In Negotiation by default, and will be updated accordingly when the contract is complete at later stage.
4. Contract Type: this field indicates the type of the contract and you can choose from a defined list. If you cannot find the type of contract you are creating, please contact research.contracts@unisa.edu.au.
5. Governing Law and jurisdiction: this field stipulates the applicable law for this contract, defaulting to South Australian law. However, alternative options are as following:
   - "Other Domestic" indicates Australian states or territories other than South Australia
   - "International" indicates the international law
   - "Silent" indicates that the contract does not explicitly mention a governing law
6. Comments: this field can be used if you have any additional note you wish to record

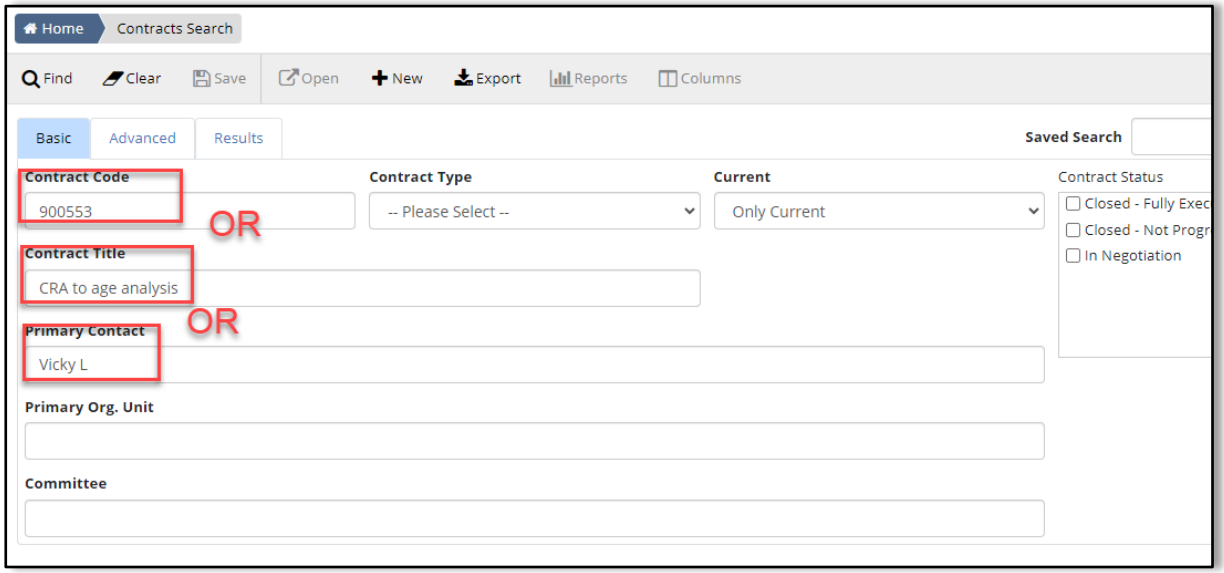
Note: You are not required to enter the above fields at this stage. However, we encourage you to do so, as this information may be beneficial even it is subject to change later on

Stage 2: Update the Contract Record when the Contract is Fully Signed

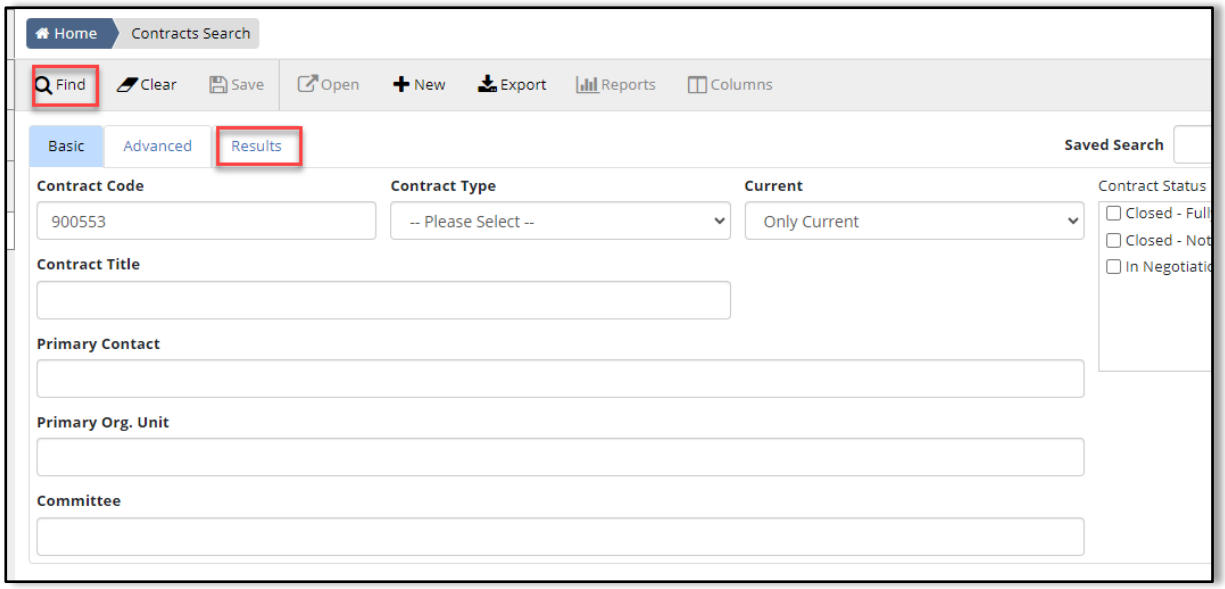
Step 1: Repeat the Step 1-2 in Stage 1 to log into MyRM

Step 2: Locate the contract created in Stage 1

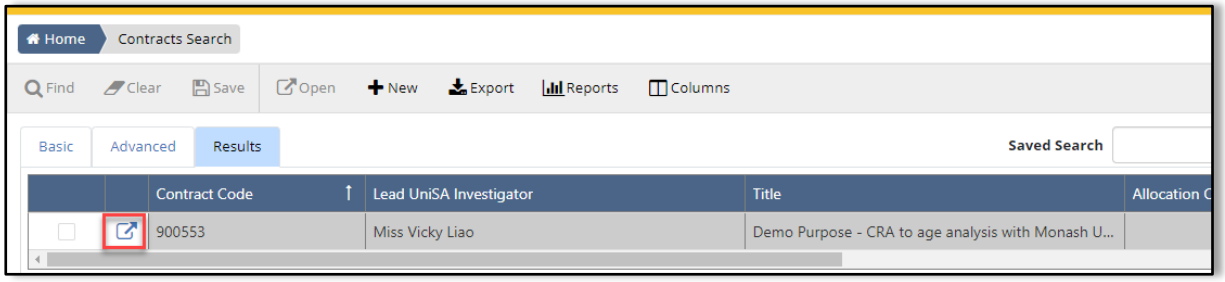
1) Search for the contract using “Contract Code” or “Contract Title” or “Primary Contact” under the “Basic” tab



2) Click “Find” Button or Click “Results” tab to see the search result



Result: the contract record is shown



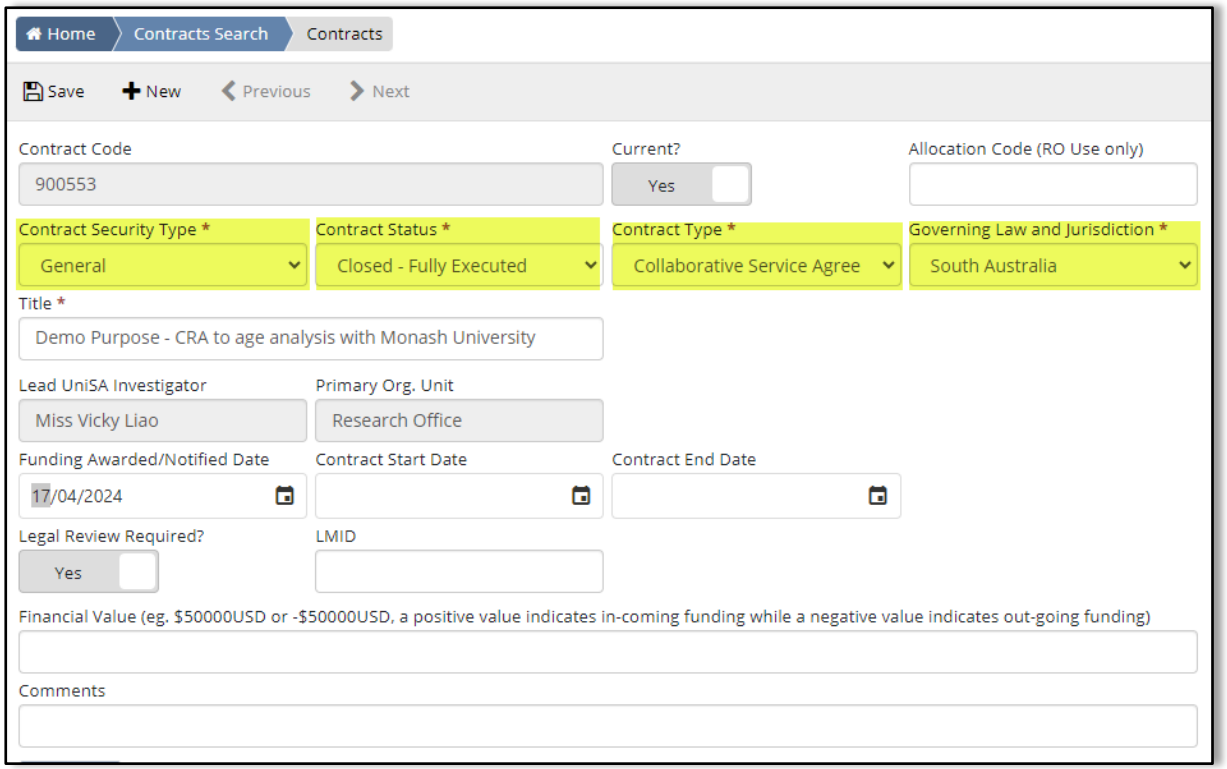
3) Click the arrow above to open the contract record

Step 3: Update the information

- Update relevant information such as Security type, Contract status, Contract type, and Governing Law and Jurisdiction.

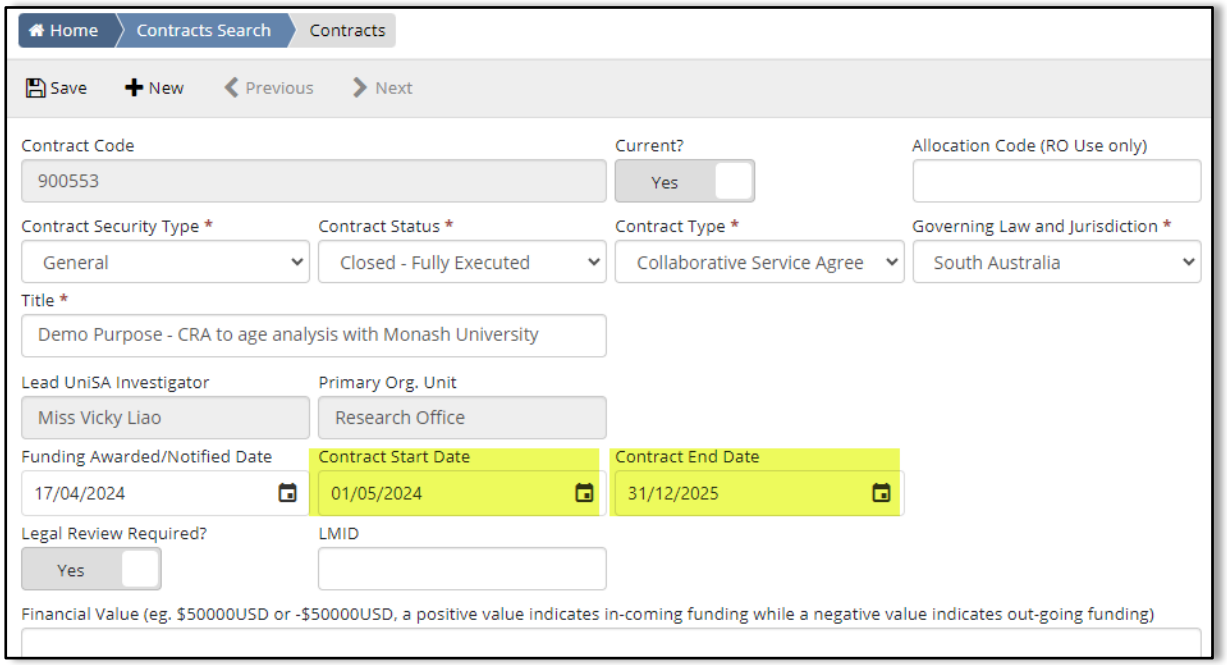
For example,

1) Update the "Contract Security type" to the appropriate level
2) Update the "Contract Status" either **Closed – Fully Executed** if the contract is complete or, **Closed – Not proceeded** if the contract is not proceed
3) Select the proper "Contract Type", if you cannot find the contract type, please contact the Research Contracts Team at research.contracts@unisa.edu.au
4) Select the proper Governing Law and Jurisdiction



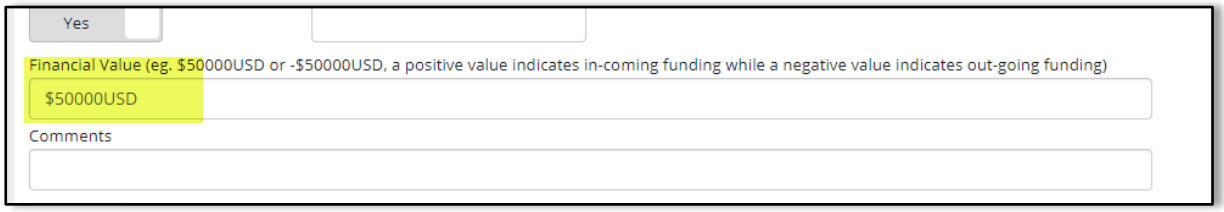
Step 4: Enter the Contract Start Date and Contract End Date

- Enter the contract start date and the contract end date



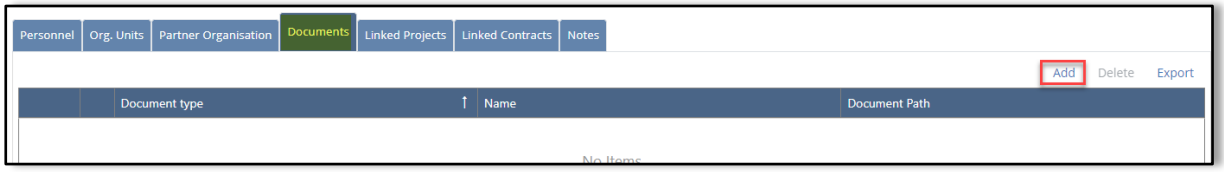
Step 5: Enter Financial Value if Associated with a Financial Value

Note: A positive figure indicates the funding in the contract is coming into the university while a negative value indicates the funding is going out from the university, please strictly comply with the format in the description, do not put any space in between



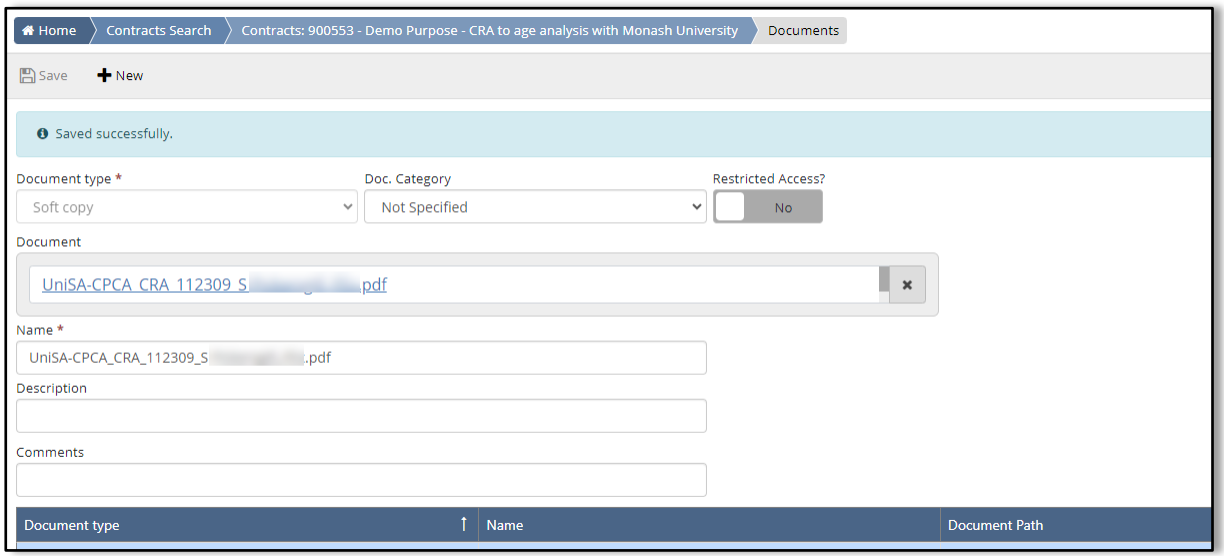
Step 6: Upload the Fully Executed Contract

1) Under the "Documents" tab, click "Add" at the far right.



2) Select or drop the fully executed contract using the "Document" field

3) Click "Save"



4) Click the breadcrumb trail (the part that starts with Contract:900553) to return to the previous page

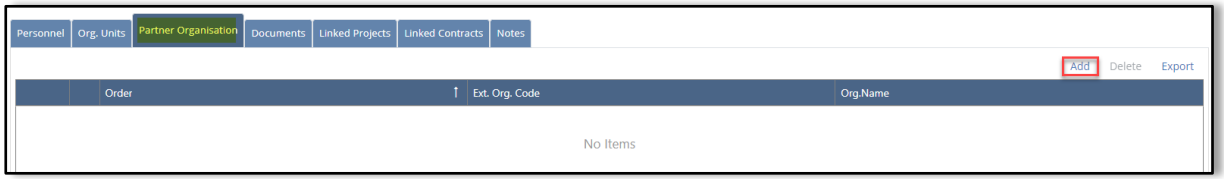
Result: The Document record has been listed under the Documents tab

Note: There should be only one contract associated with one contract record, however, you can upload other relevant document such as email correspondence by repeating this step.

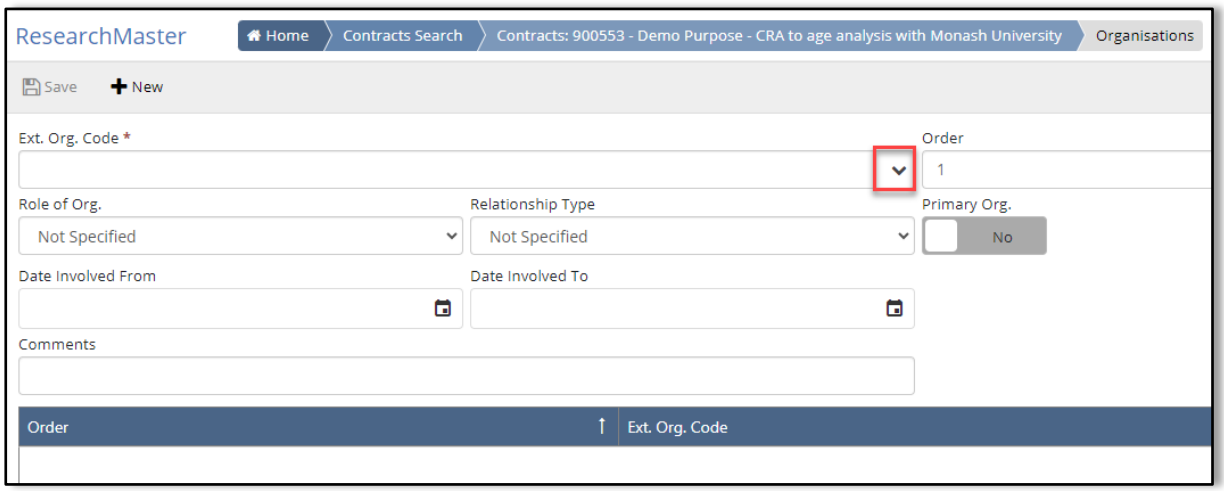
Step 7: Enter Partner Organisation when There is No Linked Project

Note: If there is no existing linked project, the organisation details need to be entered in Partner Organisation tab which can be found by searching the name of organisation in the search field or by ABN. If there is an existing Linked Project, this information is readily available in the Linked Projects.

1) At the far right under the "Partner Organisations" tab, click "Add".

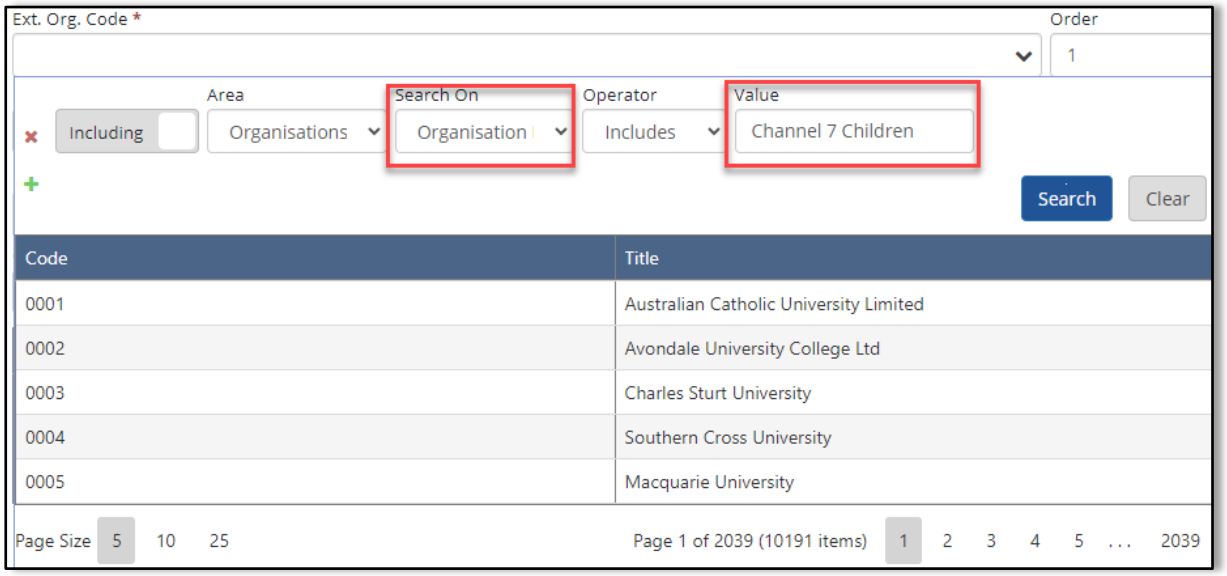


2) Use the "Ext.Org. Code" to search the organisation that is listed on the contract by clicking the adjacent arrow.

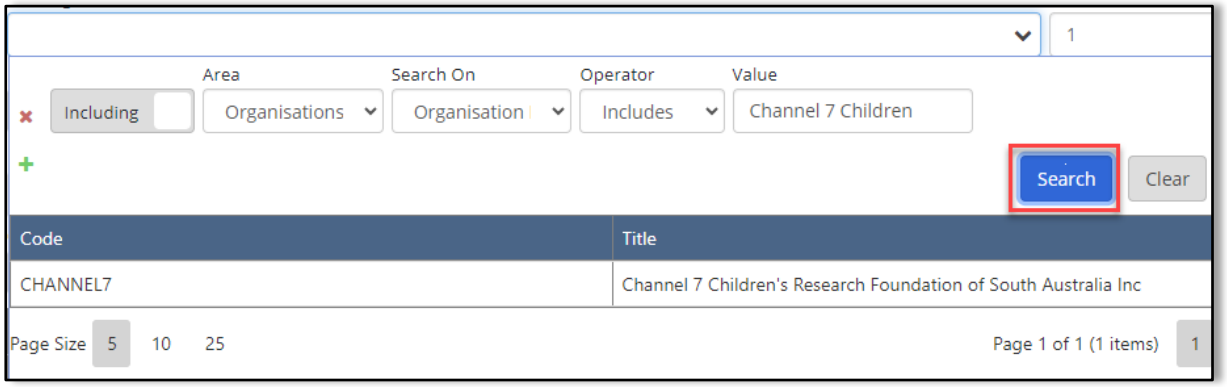


3) Change the "Search On" dropdown list to **Organisation Name** and enter part of or the whole organisation name

Note: you can search on the ABN of the organisation by choosing "ABN" in the "Search On" dropdown list

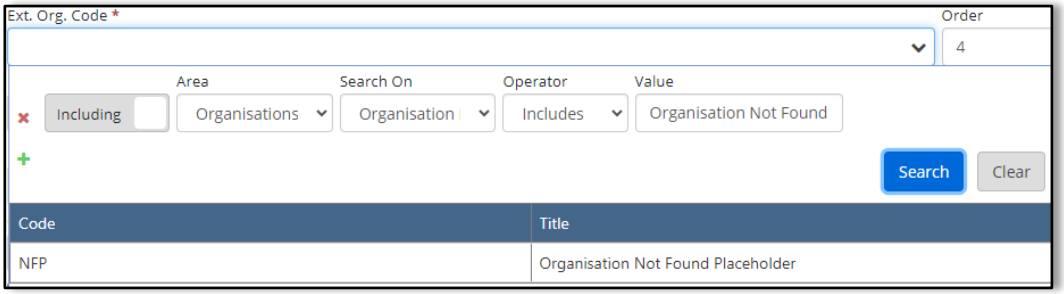


4) Click "Search"

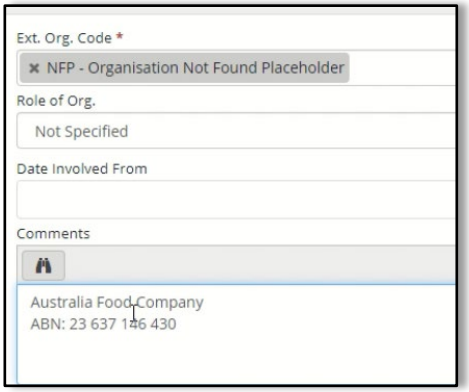


Scenario A: the organisation has already existed in the system
Action: Click to select the organisation

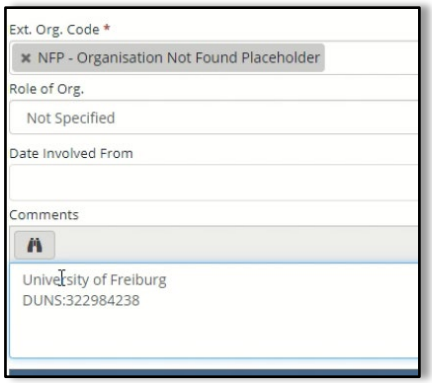
Scenario B: If the organisation is not found
Action: 1) Search on **"Organisation Name"** with "Organisation Not Found Placeholder"



2) Click to select the "Organisation Not Found Placeholder"
3) Enter the name of the organisation and ABN (if domestic company) OR DUNS (international) in the comments field.



OR

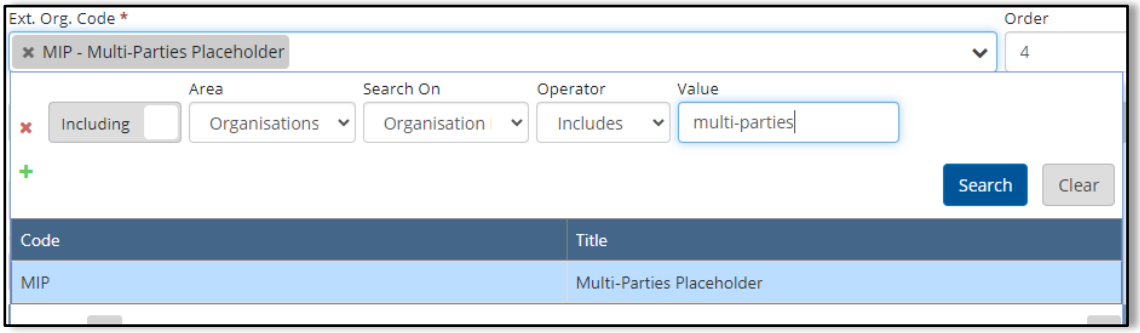


4) Email Research Systems Team at Research.Information@unisa.edu.au to set up the new organisation

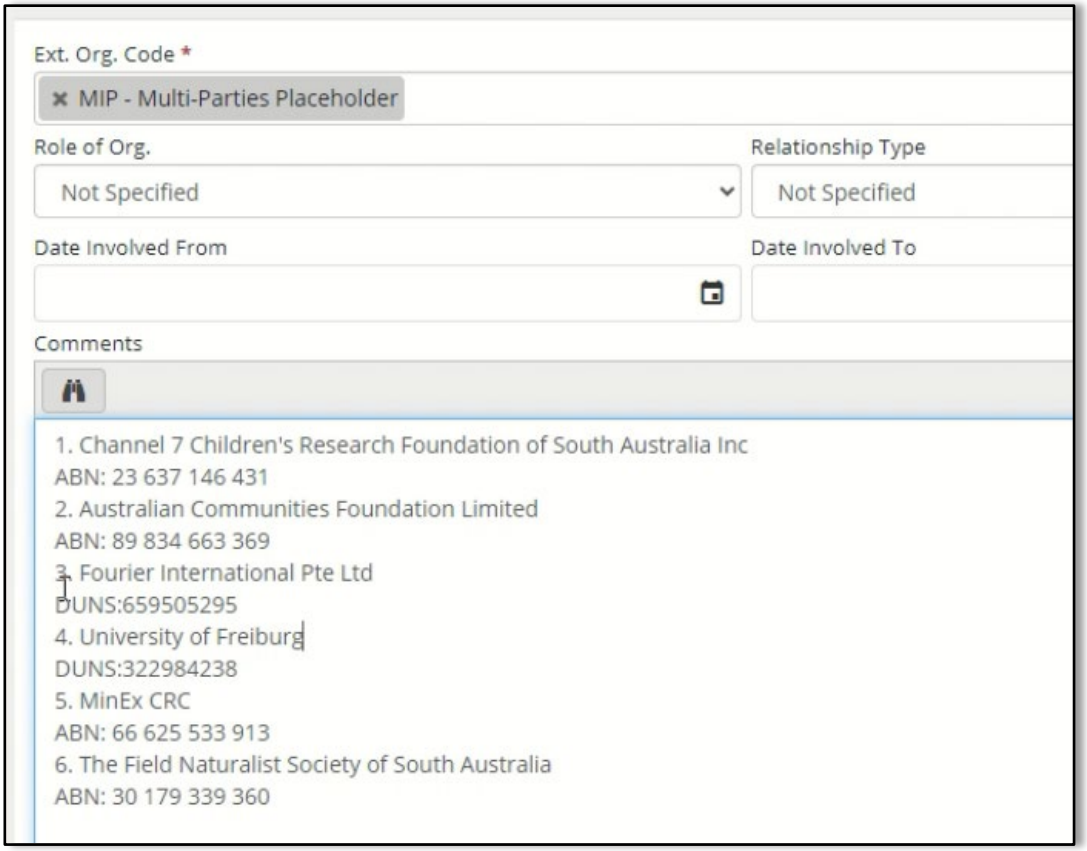
Scenario C: If more than 5 partner organisations involved

Action:

1) Search on **"Organisation Name"** with "Multi-Parties Placeholder"



2) Click to Select the "Multi-Parties Placeholder"
3) Enter the name of the organisation and ABN (if domestic company) OR DUNS (international) in the comments field.



4) Email Research Systems Team at Research.Information@unisa.edu.au to set up the new organisations

Set up this organisation for Contract: 900555

To RIS-Research Information

Hi RIS,

Please set up this organisation for Contract: 900555
1. Channel 7 Children's Research Foundation of South Australia Inc
ABN: 23 637 146 431
2. Australian Communities Foundation Limited
ABN: 89 834 663 369
3. Fourier International Pte Ltd
DUNS:659505295
4. University of Freiburg
DUNS:322984238
5. MinEx CRC
ABN: 66 625 533 913
6. The Field Naturalist Society of South Australia
ABN: 30 179 339 360

Quick Reference on Contract Page

Field Label	Description
Title	The name of the contract, or the name of the project if it is related to an existing research project/an Expression of Interest form
Lead UniSA Investigator	Lead Researcher listed on the contract
Primary Org. Unit	The org. unit of the Lead Researcher
Contract Awarded/Notified Date	It is mandatory when the contract is associated with a grant. The date is either when the contract was awarded or notified. If the award date is not known, enter the date when the notification of contract awarded was received.
Linked Project	The research project that is linked to the contract
Allocation Code	This field is used to enter the allocation code of the staff member who are working on the contract, so far it is only used by the research office, but this field is useful when you are creating a contract record on behalf of another staff member who are working on the contract, you wish to record this staff member. if you wish to use this field, please contact the Research Systems Team at research.information@unisa.edu.au to register an allocation code
Contract Security Type	Access level of the Contract This field is used to assign access to the contract records. The available options: • General - only people assigned with General access will be able to view this record. • High Sensitive – If selected, only people has been granted with this level of access will be able to view the contract record.
Contract Status	Status of the contract The available options: • Closed – Fully Executed - if the contract is complete • Closed – Not Progressed - if the contract is not going ahead • In Negotiation (by default)
Contract Type	The type of the contract The available options: • Not specified • Advice only • Collaborative Research Agreement • Collaborative Service Agreement • Confidentiality Agreement/Non-disclosure Agreement • Data Access/Transfer/Sharing Agreement • Deed • Funding/Grant Agreement • HDR Scholarship Agreement • MTA • Multi-Institutional Agreement • Novation Agreement • Project Agreement • Research Services Agreement • Tender

	• Termination of Agreement • Variation Agreement If the preferred contract type is not available, please contact the Research Contracts Team at research.contracts@unisa.edu.au
Governing Law and Jurisdiction	this field stipulates the applicable law for this contract, defaulting to South Australian law. However, alternative options are as following: • "Other Domestic" indicates Australian states or territories other than South Australia • "International" indicates the international law • "Silent" indicates that the contract does not explicitly mention a governing law
Contract Start Date	Enter the start date listed in the contract
Contract End Date	Enter the end date listed in the contract
Financial Value	If there is financial value in the contract, enter the financial value, noting a positive value indicates funding that is coming into the university while a negative value indicates funding going out of the university. Please strictly comply with the format in the description, not putting any space in between
Comments	Any additional information not entered anywhere else