CREATE A NON-FUNDED CONTRACT SERVICE REQUEST

OVERVIEW
This guide will detail how to create a Non-funded Contract Service Request (CSR). It will explain how to fill out the intake form, how to provide additional information such as contacts and documents and how to submit the CSR.

PROCESS

1. Log in to Onit.
2. Create a new Request for Contract Services.
3. Fill out the request form.
4. On the contract record add additional information such as external contacts.
5. Click Submit to Contracts team button.

STEPS
1. Go to https://mq.edu.au/researchcontracts
2. Sign in with your OnID and password.
3. Click the **Plus symbol** then **Request Contract Services** to create a new request for non-funded contract services. A Contract Services Request form will open.

4. Complete the form for Contract Services Request (CSR). Include any additional information and ensure you complete the following mandatory fields.

   A. Enter the **Contract Title**.

   B. Enter the **Primary Chief Investigator’s name** and select the PCI from the list.

   C. The **Faculty and Department** will automatically generate.

   **NOTE**
   If the Faculty and Department fields are blank or incorrect, click the fields and choose from the dropdown list.
D. Select the **Instructions to Contracts**.

E. Select the **Contract Type** from the list.

F. Continue to fill out of the form answering non-mandatory fields where applicable.

G. Enter the **Expected Start** and **Expected End Date (if known)** by typing the date into the field or by clicking the calendar icon to open a date selector window.

H. If you answer Yes to the **Ethics Required** question a new fields will appear for you to indicate the type of ethics approval required.

I. If you have the Ethics reference number you can enter that in the Ethics Numbers fields that appear.

**NOTE**
You can make multiple choices in the Ethics Type field if more than one type of ethical approval is applicable.
J. Tick the box to indicate your Head of Department is aware of your contract request.

K. Click Next -> Add Contacts to complete the intake form.

WHAT’S NEXT?
The contract will now be created as an unsubmitted Contract Service Request (CSR). Before the CSR is submitted to the contracts team, you must enter the contact information for external parties against the CSR record.

5. Click “Add Contact” button. A new window will open.

6. Enter the Contact details, particularly the email address.

A. Click External Party.

B. Type the external party name into the contact field and choose from the list.
NOTE
If you were unable to find the external party in the previous step, tick “Details not found. Create a new one”. New fields will appear for you to enter the contact details.

C. Enter the rest of the external party contact details.

D. Click Submit.

NOTE
The external parties will now appear on the contract page under a tab titled **External Party(ies)**.
Repeat from step 5 to add additional external parties to the contract.

7. To add related investigators click “Add Contact” button. A new window will open.
## Contract Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Code</td>
<td>20190310512</td>
</tr>
<tr>
<td>External Reference Number</td>
<td></td>
</tr>
<tr>
<td>Contract Title *</td>
<td>A Test Project Title of a Contract</td>
</tr>
<tr>
<td>PCI Title</td>
<td></td>
</tr>
<tr>
<td>Primary Chief Investigator *</td>
<td>Andrew Burford</td>
</tr>
<tr>
<td>PCI Faculty</td>
<td>Macquarie University Administration Unit</td>
</tr>
<tr>
<td>PCI Department</td>
<td>Information Technology</td>
</tr>
<tr>
<td>Instructions To Contracts *</td>
<td>Review attached agreement</td>
</tr>
<tr>
<td>Contract Category</td>
<td>Non-Funded</td>
</tr>
<tr>
<td>Contract Type *</td>
<td>Confidentiality Agreement (NDA)</td>
</tr>
</tbody>
</table>
8. Enter the Contact details, particularly the email address.

   A. Click **Related Investigator**.

   B. Type the external party name into the **Contact** field and choose from the list. More fields will appear populated with additional contact information already in the system.

   C. Enter the **External Organisation** if the related investigator is from another institute.

   D. Click **Submit**.

**NOTE**

The external parties will now appear on the contract page under a tab titled **Related Investigator**. Repeat from step 7 to add related investigators to the contract.

9. Click the **Add Document** button to attach necessary documents for the contract service request. A popup window will appear.
A. Enter the **title** of the document.

B. Click **Browse** and select the document to upload from your computer.

C. Click **Submit** to attach the document. The popup window will close and you will return to the contract details screen.

10. To progress this contract into the workflow click **Submit to Contracts Team**.

**NOTE**

If you haven’t entered external party contact details, the system will stop you from submitting the CSR. You will be shown the following error message in the bottom left-hand corner of the screen.

Add an external party and you will be able to submit the contract. For instructions on how to add an external party, refer to step 5.

**WHAT'S NEXT?**

The submitted CSR will now show the phase as **Unassigned**. This will change as the CSR progresses through the workflow and you can log in to check the progress.

For additional help:

- +61 2 9850-HELP (4357)
- rms.support@mq.edu.au
- Log a OneHelp ticket