RESEARCH ADMINISTRATION PORTAL (WRAP)

Agreements Create and Submission Quick Guide

Topics

Overview

This quick guide is designed specifically for this training session, providing an overview of agreements in WRAP. The types of agreements and how they are initiated and will be reviewed. The steps are intended for training purposes, and participants are encouraged to make their own adjustments during the session as needed.

The WRAP system supports multiple agreement types, each essential for ensuring compliance and supporting research initiatives. Agreements in WRAP vary in initiation and routing, depending on the agreement and the responses to specific compliance questions. Some agreements, such as the COE Review/Clinical Trial Agreement, Data Use Agreement, and Non-Disclosure Agreement (NDA), can be initiated directly by Principal Investigators (PIs) or their designated team members.

For other agreements, including Memorandum of Understanding, Memorandum of Understanding, and Outgoing Subaward, etc., initiation and management are handled by specific offices, such as the OIC Agreement Office, Clinical Trial Agreement Office, or the Award Negotiation Agreement Office.

Note: Participants in this training are encouraged to review the attached Guide alongside this one, which details each agreement type, who initiates it, routing protocols, and associated business rules.

The WRAP Agreements Module features include:

- **Automated routing** by **agreement type** to the appropriate offices
- **Customized submission** forms by agreement type

- Ability to **link agreements** to **other projects**
- Flexible **management of ancillary reviews** and approval

Note: Certain types of agreements will be initiated by the **WVU Research Community**, and other types of agreements will be initiated by the **agreement offices**.

Agreement Types

Agreement Type	Initiated by	Assigned to Offices
COE Review/Clinical Trial Agreement	Principal Investigator (PI) or Designee	Clinical Study Agreement Office
Data Use Agreement	Principal Investigator (PI) or Designee	Award Negotiation Office or Clinical Study Agreement Office
Facility Use Agreement	Principal Investigator (PI) or Designee	Office of Innovation and Commercialization (OIC) Agreement Office
Material Transfer Agreement	Principal Investigator (PI) or Designee or Office of Innovation and Commercialization (OIC)	Office of Innovation and Commercialization (OIC) Agreement Office
Non-Disclosure Agreement	Principal Investigator (PI) or Designee	Office of Innovation and Commercialization (OIC) Agreement Office or Clinical Study Agreement Office
Teaming Agreement	Office of Innovation and Commercialization (OIC) or PI/Designee/Support	Office of Innovation and Commercialization (OIC) Agreement Office
Memorandum of Understanding	Research Office OSP Award Negotiation	Award Negotiation Office
Master Agreement	Research Office OSP Award Negotiation	Award Negotiation Office or Clinical Study Agreement Office or Office of Innovation and Commercialization (OIC) Agreement Office

Research Agreement	Research Office OSP Award Negotiation	Award Negotiation Office
Outgoing Subaward	Research Office OSP Award Negotiation or Center of Excellence (COE) (not generated by general research community)	Award Negotiation Office, Clinical Study Office
Other Agreement	Research Office OSP Award Negotiation	Award Negotiation Office

Steps

Access

Training (Staging) Access

1. Navigate to WRAP Electronic Research Administration Systems: https://researchoperations.wvu.edu/resources/administration-and-compliance-systems
2. Click the **WRAP Test** button.
3. Click the Client Login button.
4. Sign in with your SSO credentials

Production Access

1. Navigate to WVU Research Operations Website: https://researchoperations.wvu.edu/home
2. Click the **WRAP** button.
3. If prompted sign in with your SSO credentials

Agreements Navigation and Basic Tasks

Navigate the General Dashboard Video (opens in a new tab)

Navigate the Agreements Page Video (opens in a new tab)

Navigate the Agreement Workspace Video (opens in a new tab)

RESEARCH ADMINISTRATION PORTAL (WRAP)

WRAP Dashboard Terms & Definitions

- **Create Menu:** Create drop-down menu buttons that allow you to create various items in the system, such as proposals or agreements
- **Recent: L**ists the last several items a user has accessed, with the most recent at the top. Items can be pinned for quick access using the pin icon.
- **Pinned:** Pinned items are stored for easy access, regardless of when they were last viewed. Pinned items remain until manually unpinned.
- **My Inbox:** Displays all items requiring user action to move forward in the workflow e.g. proposals, agreements, and awards.
- **My Reviews:** Shows a subset of items **from My Inbox**, specifically those awaiting the user's review. Useful for users who may have multiple roles, like researchers who also serve as ancillary reviewers.
- **State Column:** Shows item workflow status and helps guide the next steps.
- **Personalize Table:** Users can adjust table settings using the gear icon, enabling them to configure the columns and data that appear. They can also export data to CSV files.
- **Top Navigator:** The main navigation tool at the top of the dashboard allows users to move to different parts of WRAP.
- **Breadcrumb Trail:** Located under the top navigator, this trail indicates the current page and allows users to navigate back to previous pages.
- **Filter by Text:** Type the first part of the text you want to find. Use % as a wild card. Users must prepend the '%' wildcard before entering search terms (e.g., '%defense') when using the search function. Add a prompt or help text instructing users to use a wildcard before typing search terms.

Exercise #1: Create an Agreement e.g., Non-Disclosure Agreement

Agreement Upload

1. **Principal Investigator**: The individual responsible for managing the agreement is usually the principal investigator (PI). Enter yourself as the **PI**.
2. **Primary Contact**: This field is automatically populated with the person who created the agreement but can be changed if necessary.
3. **Upload Agreement Draft**: Attach the draft agreement file or, if applicable, select the check this box **First Draft to Be Generated Internally?** For this training check the box to indicate the draft will be generated internally in **Q3**.

Note: If the agreement document has already been drafted, you can attach it to the Agreements SmartForm by clicking the Upload button. However, if Agreements office staff are going to create the first draft of the agreement, check the First draft to be generated internally? box instead. Agreements office staff will generate or upload a draft by running the Generate Agreement activity.

4. **Title or Internal Reference Number**: Provide the internal reference title or number for this agreement. For this training include your **last name** in the title e.g. NDA 11182024 Nyachae
5. **Agreement Type**: Select the specific type of agreement from the dropdown, e.g., Non-Disclosure Agreement – PI Initiated

6. **Description**: Write a brief summary or purpose of the agreement. For this training enter any values
7. **Supporting Documents**: Attach additional documents as needed. For training purposes attach any documents
8. **Sponsor Deadline Date**: Enter the sponsor's deadline date for the agreement.Enter any further date

General Information

1. **Contracting Party**: Select the external organization involved in the agreement.
2. **Contracting Party Contact Name**: Enter the name of the representative from the contracting party:
3. **Contracting Party Contact Email**: Provide the email address of the contracting party contact:
4. **Contracting Party Contact Phone**: Enter the phone number of the contracting party contact:
5. **Additional Contracting Parties?**: Select Yes or No to indicate if there are additional contracting parties involved.
6. **Responsible Department/Division/Institute**: Specify the internal department responsible for this agreement:
7. **Agreements Collaborators**: List any collaborators who will have read/edit access to the agreement, or indicate none if not applicable.
8. **Bilateral or Unilateral**: Specify if the agreement is bilateral (Both parties sign the agreement) or unilateral (one party), or unknown.
9. **Is a Proposal Associated with This Agreement?**: Select Yes or No to indicate if a related proposal exists. For the purposes of this training indicate Yes

NDA Agreement Information

Note: For training purposes, enter any values in Q1-Q5 on the NDA Agreement Information page.

1. **Describe the Purpose of the Exchange**: Briefly explain the reason for exchanging information e.g., To assess potential partnership opportunities for developing a sustainable energy solution.
2. **Who Will Be Disclosing Information?**: Identify who will disclose information, e.g., Contracting Party, Institution or Both.
3. **Provide a Brief Description of the Confidential Technology or Information**: Summarize the confidential data or technology to be shared e.g., Specifications for a new battery prototype designed for improved energy efficiency.
4. **Is It Mandatory to Receive or Disclose Confidential Information?**: Indicate if confidentiality is essential for the agreement's purpose by selecting Yes or No.
5. **Is There a Deadline to Have the Agreement Signed?**: Indicate if there is a signing deadline, and provide the date if applicable. For training purposes select No

NDA Additional Information

Note: For training purposes, enter any values in Q1-Q6 on the NDA Agreement Information page.

1. **Is There a Possibility of Co-Mingling Confidential Information?**: Select Yes or No to indicate if the confidential data might mix with other internal information.

2. **Will Confidential Information Be Shared with Non-Employees?**: Select Yes or No to indicate if non-employees (including students) will access the confidential information.
3. **Has an Invention Disclosure Been Submitted?**: Indicate if an invention disclosure is associated with this agreement by selecting Yes or No.
4. **Plan to Submit an Invention Disclosure?**: Confirm if there are plans to submit an invention disclosure before the information exchange, e.g., No.
5. **Is This Related to Clinical Research?**: Indicate if the agreement involves clinical research by selecting Yes or No.
6. **Proposed Disclosure Period**: Define the time frame for sharing information under this agreement, e.g., 1 year.

Use the **Validate** button in the top left corner to ensure that no field values were missed, then save and exit to return to the **Agreement Workspace**.

Manage Relationships

1. Click **Manage Relationships** and search for an award record with the Name: **UAT agreement award**. You can search by typing the title in the **Related Submissions** search box.
2. Select it and click **OK.**
3. Navigate to the **Related Projects** tab and ensure the award is present.

Agreements WorkSpace Terms & Definitions

- **Agreement Workspace**: The central hub where users can access and manage details about an agreement, including its state, key personnel, milestones, documents, and related projects.
- **State**: The current status of the agreement, displayed in the upper left corner of the workspace.
- **Key Personnel**: Individuals assigned to the agreement, such as the owner, collaborators, and reviewers.
- **Milestones**: Significant deadlines or events in the agreement process, visible near the state information.
- **Summary Information**: Overview details about the agreement, such as its type, managing office, and key links, found in the upper right corner.
- **Workflow Map**: A high-level visual representation of the agreement's creation and approval process, with an orange indicator showing its current position.
- **Correspondence Tab**: A section that logs and tracks action items, such as emails, related to the agreement review process.
- **History Tab**: A detailed list of all actions and activities performed on the agreement.
- **Ancillary Tab**: A tab showing internal reviewers (ancillary reviewers) involved in the agreement review process.
- **Contacts Tab**: Displays the agreement owner and other personnel associated with the agreement.
- **Snapshots Tab**: Provides read-only versions of the agreement's smart form, captured at key points in the workflow.

- **Related Projects Tab**: Lists and links to other projects associated with the agreement, such as funding proposals.
- **Documents Tab**: Contains the final agreement, amendment files, and any supporting documents uploaded to the agreement.
- **Amendments Tab**: A tab that appears when amendments are linked to an approved agreement.
- **Activities and Buttons**: Functional options on the left side of the workspace, which vary based on the agreement's state, user role, and involvement.

Exercise #2: Submit an Agreement for Review

1. On the Non-Disclosure Agreement (NDA) you just created.
2. In the agreement workspace, click the **Submit** activity on the left side.
3. Read and agree to the submission statement, then click **OK** to submit the agreement for review.
4. Return to the **Dashboard** to confirm that the agreement is no longer in your inbox and has been sent for review.

Exercise #3: Respond to a Clarification Request

1. From My Inbox, click the agreement name to open it.
2. Click the **History** tab.
3. Look for the **Clarification Requested** activity and review any reviewer comments.
4. If required, click **Edit Agreement** on the left and make the changes.

   Note: You can enter a response for the reviewer before submitting the agreement.

5. Click **Submit Changes**.

   Note: In case you have changed the agreement type, make sure to complete the related pages of the agreement type in the SmartForm. In case you miss filling out the pages or mandatory entries then the system will validate and throw an error message. Only when the validation is approved, you can go ahead and submit the change.

6. In the Notes box, type a response to the reviewer's comments or questions.
7. Click **OK**.