



Agreement Smart Forms Information		
Numbered items are skipped below when required information is self-explanatory. This list may vary slightly for non-federal sponsors.		
Princeton ERA Page	Description	Action
AGMT – Agreement Upload	3. Upload Agreement Draft	Upload agreement from sponsor. If Princeton to initiate first draft, click the box stating we will do so – read help bubble for details
	4. Title or internal reference number	This is internal – if for a student/post-doc, list their name as a suffix. Reports are run from this field.
	6. Description	Include enough information to describe the work. SOW gets uploaded below,
	7. Supporting Documents	Include SOW and other information here if not attached to Agreement draft uploaded in question 3 above.
AGMT – General Information	1. Select an organization	If ORG is not in the system, enter the contracting party name and then send to erasupport@princeton.edu to add to the database.
AGMT – Agreement Information		Respond to questions as required
Depending on the Agreement type, there will be additional branching questions. Complete as required. Ask ORPA Specialist if questions arise.		
Agreement Workspace Activities - Prior to Submitting to ORPA Specialist		
Manage AR Activity	Ancillary Reviews	Submit Agreement Assurance for all Non-funded Agreements for PI and all co-PIs. THIS IS A PAPER FORM found on the PRINCETON ERA webpage. This must be sent to yourself (DA).
Notify Ancillary Reviewers	Ancillary Reviews	This sends a notice with AR to all those that need to complete any AR.
Manage Relationship Activity		If this is linked to an existing funding proposal, connect the records now. If the compliance information in the FP is still accurate, a PI Assurance DOES NOT need to be executed. The FP Assurance will apply. If any compliance information has changed, the AR must be submitted.
Submit Activity		This sends the record to ORPA in an unassigned state. Send your ORPA Specialist an email (outside of system) notifying them it is available.
ORPA Specialist Activities/Review/Negotiation		
Princeton ERA Page	Description	Action
AGMT - Workspace	Assign Owner	ORPA Specialist assigns to their worklist.
	Edit Agreement Button	Review all submitted information. Ask Dept. for clarification if necessary using the request clarification activity.
		Download and review the agreement that was previously uploaded. Make changes and upload into the system using the Revise Agreement Activity.
		If initial draft is not provided, use our boilerplate agreement, with required edits, and upload using the Generate Agreement activity.
		Email agreement to yourself with cc: to agreements@princeton.edu (email catcher)
		Forward email to sponsor for their review. Execute Move to External Review activity

ORPA Specialist Activities/Review/Negotiation		
Princeton ERA Page	Description	Action
	Agreement returns from sponsor	Execute Move to Internal Review activity, then upload revised agreement that was received using Revise Agreement Activity (this keeps track of versions. Make sure you upload this version BEFORE making additional revisions to the agreement so preserve version control. Review agreement and then upload updated
		Now review and make changes to this agreement at this time. These steps can repeat as often as required.
		Once the agreement is in a final state, execute Approve Language activity and complete the smart form. You cannot proceed if any ARs are outstanding.
		Execute Send out for Signature activity. Then execute Email Agreement Activity to yourself and cc: agreements@princeton.edu (email catcher) to permit the forwarding of the signature version to the sponsor.
		Executed agreement is received – we execute Revise Agreement activity to upload the fully executed agreement. Then execute Convert to PDF activity to store the agreement in the workspace (even if the final agreement received is in PDF, you still need to complete this activity).
		Execute Activate activity and complete smart form – and agreement is now active.

8/31/20