



Research Contracts Management Software

G-Cloud 15 Service Definition Document

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Introduction

At Infonetica, we empower the world's leading researchers with an ecosystem of software products that make their lives easier, so they can focus on delivering the groundbreaking research of tomorrow.

Supporting over 2 million research projects across 14 countries, Infonetica's products support the end-to-end lifecycle of a research project including: research grant and funding applications (Pre-Award), research governance, research ethics review, data protection impact assessments, export controls management, research project due diligence, research contracts management, clinical trial management and compliance training for researchers.

Infonetica's "Contracts" module is a dedicated cloud-based solution for creating, maintaining, tracking, approving, circulating and storing contracts, terms and conditions agreed between all parties involved in collaborative research.

Contracts enables Principal Investigators and their Partners & Collaborators to:

- Seamlessly and efficiently manage contract documents throughout the lifecycle of the contract (i.e. through creation, negotiations, execution and termination)
- Identify and action where contracts or agreements are required with other parties during the research application process
- Maintain a 'Master Contract tracker' dashboard to keep an up-to-date view of all contract statuses
- Automatically classify contract type required
- Create workflows to automatically route contract documents to the relevant reviewers and approvers/signatories based on the contract type
- Access contextual guidance and clear instructions on contract requirements processes
- Configure custom alerts for reviewers and other involved parties to ensure deadlines are not missed
- Save significant time for Principal Investigators, Contract / Procurement teams, Legal & Compliance teams and Research Office personnel
- Store Contracts and related documents (e.g. corresponding budgets, grant and funding agreements, due diligence reports, compliance approvals etc) logically and securely
- Hold a full audit trail of document amendments, approvals, signatures etc

Summary of Functionalities

- Create and manage research contracts with industry partners
- Build contracts collaboratively using peer review
- Conduct legal and compliance approvals at multiple stages as needed
- Invite external stakeholders for collaborative proposal development
- Configure multi-stage approval and signatory process
- Track contract statuses throughout contract lifecycle (creation, negotiation, execution and termination)

Contract Types

Any agreement between parties involved in a research project can be managed within Infonetica's Contracts module, for example:

- Partnership Contract Terms & Conditions
- Collaboration Contract Terms & Condition
- Service Schedules for products or services being delivered
- Data Transfer Agreements
- Service Level Agreements
- Non-disclosure / Confidentiality Agreements
- Drug Only Research Agreements
- Clinical Research Agreements
- Evaluation Agreements

Project Types

Contracts module can be configured to manage any type of contract for any type of collaborative research project, e.g.

- Where personnel from two or more institutions are working collaboratively to deliver the research
- Where two or more organisations or institutions are in partnership to deliver the research
- Where two or more organisations or institutions are in partnership to fund a particular research project
- Where a project makes use of third party facilities and / or equipment

Collaboration

- Set access levels for collaborators
- Researchers can collaborate on applications

- Supervisors can comment or review before submission
- Legal, compliance teams can input on contract terms
- Research office can help with the costing and funder rules
- Committee reviewers can collaborate on the review of the submitted application

Automation

- Automated classification of contract type
- Automated routing to different faculties/departments and committees, or partners and collaborators for input and approval
- Automated notifications and emails when key milestones are met
- Automated alerts when deadlines are approaching or missed
- Automated version control with storage of previous application versions
- Automated collation of reviewer comments into documents and contracts under negotiation or renewal

Workflow

- Create complex workflows with very little training and no programming knowledge
- Create multiple workflows within the same environment
- Create and configure interactive forms and workflows
- Update workflow and forms at any time
- Use logical branching to simplify research proposal completion

Communication

- Standard communication templates
- Automated communication
- Editable letter and email templates
- Correspondence feature to allow applicants and reviewers to communicate within the system

Documentation

- Central repository of all applications and associated documents including:
 - NDAs
 - Partnership Agreements
 - Application versions
 - Contract versions
 - Terms & Conditions versions
 - Service Level Agreement versions
 - Amendment forms

- Adverse event forms
- Annual reports
- Study closure forms
- Version control

Forms

- Configurable forms with a range of question types
- Filter questions and dependencies
- Dynamic forms
- Completeness checker
- Help, FAQ and user guide functionality

Review Process

- Reviewers can be assigned to (or removed from) committees and applications
- Rule-based routing of grants/contracts applications to faculties and departments
- Review process can be configured to get sign off from Grants/Ethics Research Office
- Rule-based automatic application assignment to reviewers or committees can be configured
- Reviewers can be assigned based on workload
- Multiple reviewers could simultaneously work on the same application
- Reviewers can quickly and easily track changes between submissions
- Applications can be annotated by reviewers
- Reviewer annotation can be set as only visible to other reviewers
- Virtual review meetings can be held
- Applications can be escalated to a higher-level reviewer
- Reviewer comments can be moderated

Admin Process

- Contracts can be reviewed
- Comments can be added
- Changes can be requested and reviewed
- Reviewers can be assigned
- Conflicts of interest can be registered
- Contracts can be assigned to meetings
- Contract types can be changed
- Contracts may be re-routed to different parties (escalate/de-escalate)
- Comments can be registered “closed”
- Comments may be moderated prior to feeding back to other parties
- Decisions can be registered

- Forms and workflows can be created and configured
- The system can be personalised with custom role-related desktop views

Dashboard

- Dashboards for research administrators, third party Partners & Collaborators and reviewers
- Timeline tracker
- Reporting dashboards with data and trends on KPIs
- Personalised content, showing only applications the user is involved with

Reporting

- Reporting on any data within the system
- Reporting on actions, status, applications
- Reporting on funders, costs and budget
- Output in several formats such as pdf, html, csv, word as well as via API
- Set and share standard reports
- Schedule recurring reports

Audit

- Audit trail of all activity on applications, including:
 - Applicant changes
 - Reviewer activity
 - Timestamp
 - Identity of user
 - Emails sent
 - Alerts sent
 - API calls made
 - Documents accessed by users
 - Reports run
- Page visits by user, time and date visited

Alerts & Reminders

- Automatic alerts and reminders
- Timeline recording
- Alerts for annual reports
- Alerts for overdue reviews
- Alerts for overdue resubmissions / version control

Interfaces

- Consume and output information from/to other software through APIs

System

- Choice of an open or closed system
- Web-based, accessible from any device with a browser
- Supports single sign-on

Data Protection

- GDPR compliant

Support

Training

- Training for administrators
- Train-the-trainer sessions
- Introduction training to reporting
- Provision of training environment

Helpdesk

- Support via email, telephone and Jira online ticketing system
- 9 am – 5 pm Monday to Friday excluding bank holidays
- Defined escalation and response routes
- Appointed point of contact

Data Migration

- Facility for easy data migration of research database from other systems

Infrastructure

Service

- Hosting in the cloud to comply with data protection and sovereignty
- Redundancy and overprovisioning for a reliable and uninterrupted service
- SLA (Service Level Agreement) with 99.9% uptime
- 24x7 monitoring and alerting

Integration

- Transactional and batch REST APIs
- Bulk import service for efficient data migrations
- Single Sign-On: ADFS, Azure AD and Native SAML2 iDPs such as Shibboleth

Security

- ISO 27001 certification
- Cyber Essentials Plus accreditation
- Regular independent penetration tests and audits
- Data encryption at rest and in transit

Updates

- Regular updates driven by feedback from the Infonetica global customer community
- Optional release preview environment
- Empowered product engineering team approach going beyond agile