Searching for an existing contract submission record

The Contract Submission Workbench in Themis allows you to view all contract submissions you have created, as well as those on which you have been nominated as a participant.

In addition, the **Refine Search** function enables you to access other contract submission records to either view a summary of the submission, update/modify the submission (if granted appropriate access) or copy a submission record.

Accessing the Submission search screen

1. Log on to Themis using your UOM Research Self Service responsibility.
2. Select the **Contract Submission Workbench** function listed under the Grants and Contracts section.

The Contract Submission Workbench will display.

**Contract Submissions in Draft**

This section displays any contract submissions you have created or on which you are a nominated participant that are in draft stage (e.g.: new applications or those requiring further information). You will have access to view these applications and, depending on the access granted, update as required.

**Contract Submissions Under Review**

This section displays any applications on which you are a nominated participant that have been submitted to the Agreement Administrator for review.

**Contract Submissions Submitted to Research Office**

This section displays any applications on which you are a nominated participant that have been submitted to the Research Office Administrator for review.
Searching for an existing contract submission record in Themis

1. Click on the **Refine Search** link in the Contract Submission Search section to display the search fields.

2. Enter one or more criteria on which to search.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission ID</td>
<td>Enter the ID number of the submission record.</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Enter the full or partial title of the submission record.</td>
<td>Note: use the % wildcard to widen your search (e.g.: entering %protein% will retrieve all records with this word anywhere in the title).</td>
</tr>
<tr>
<td>Researcher Name</td>
<td>Click on the search icon to select the researcher from the List of Values (LOV).</td>
<td></td>
</tr>
<tr>
<td>Agreement Administrator</td>
<td>Click on the search icon to select the name of the agreement administrator from the LOV.</td>
<td></td>
</tr>
<tr>
<td>Research Office Administrator</td>
<td>Click on the search icon to select the name of the Research Office Administrator from the LOV.</td>
<td></td>
</tr>
<tr>
<td>Owning Department</td>
<td>Click on the search icon to select the appropriate department from the LOV.</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Select the appropriate submission record status from the drop-down list.</td>
<td>Values available are: Draft, Under Review, Submitted to Research Office, Transferred to Proposals and Withdrawn.</td>
</tr>
</tbody>
</table>

3. Click on the **Search** button to perform your search.

   The results will display in a table below the search criteria. Depending on your access, you may view, update, delete or copy the submission record.

<table>
<thead>
<tr>
<th>Submission ID</th>
<th>Title</th>
<th>Owning Department</th>
<th>Principal Chief Investigator</th>
<th>Current Agreement Administrator</th>
<th>Status</th>
<th>View</th>
<th>Update</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>2607</td>
<td>A really exciting research opportunity</td>
<td>Chemistry</td>
<td>ESTER, MS POLLY ANNE</td>
<td>Draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2608</td>
<td>The appeal of natural fibers - is cotton really better?</td>
<td>Chemistry</td>
<td>ESTER, MS POLLY ANNE</td>
<td>Draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2609</td>
<td>Why don't a penguin's feet freeze</td>
<td>Zoology</td>
<td>ESTER, MS POLLY ANNE</td>
<td>Under Review</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Themis will remember your current search results. This means that when you return to the Contract Submission Workbench after viewing an individual submission record, the search results table will retain the search criteria you entered and the records retrieved in the search.
Viewing submission details

1. Locate the appropriate submission record and click on the View icon. An overview of the submission record will display. This screen is view only and you will not be able to make any changes.

2. Click on the Printable Page button to open a printer friendly version of the summary screen. Note: the printer friendly version will open in a new screen.

Updating submission details

If you have been granted Update access to the selected submission record, you will be able to make changes to the details as required. Note: you will not be able to make changes once the record has been submitted to the Research Office for review.

1. Locate the appropriate submission record and click on the Update icon. Alternatively, click on the Update Submission button located in the Submission Summary screen. The Submission Details screen will display.

2. Progress through the submission record and update as required.

For further details regarding entering data refer to the Creating a contract submission record reference card. Important: if you change the Contract Type or Agreement Type of the record, you must check all steps in the submission to see if there are any extra screens/fields that need to be completed.
Copying a submission record

If you wish, you may copy an existing submission record to make a new submission.

1. Locate the appropriate submission record and click on the View icon.
   An overview of the submission record will display. **Note:** this summary screen is view only and you will not be able to make any changes.

2. Click on the Copy Submission button.
   A new Draft record will be created from the original.

3. Update the new submission as required and save the record in the appropriate status.
   Once saved, the record will display on your workbench in the relevant status section.