

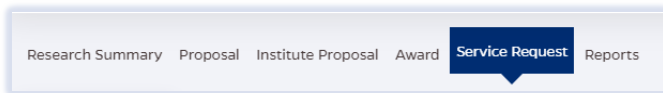
Create a Service Request Unfunded Collaboration



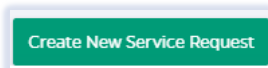
How do I create a Service Request for an Unfunded Collaboration?

❖ Unfunded Collaboration was previously known as Negotiation Only in Coeus. This type of Service Request is only applicable for School of Medicine contracts. These requests should never involve funding.

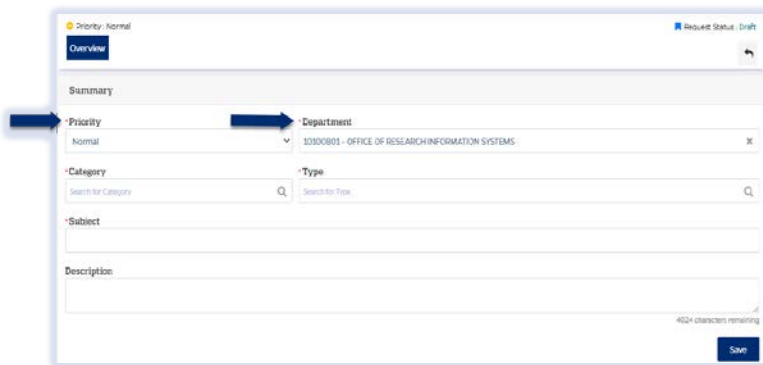
❑ From the Dashboard, click on **Service Request** in the top row.



❑ Click on the green **Create New Service Request** button in the upper right corner.



The following screen will open:

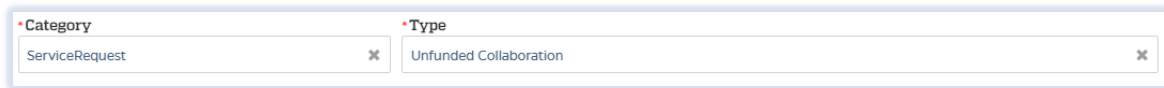


The **Priority** dropdown menu can be changed if needed to *low* or *high*.

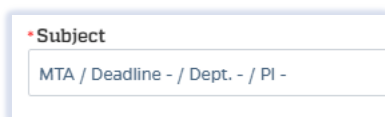
❑ The **Department** field is the lead unit or first 8-digits of the cost center. Begin typing the unit name and a dropdown menu with options will open.

❑ Choose the **Category** – **Service Request** from the dropdown menu.

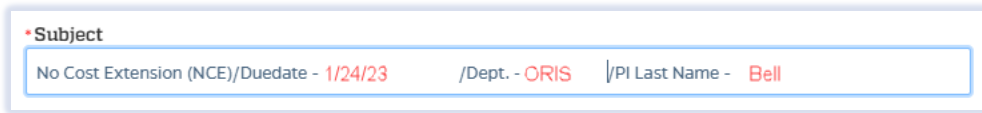
❑ Choose the **Type** – **Unfunded Collaboration** from the dropdown menu.




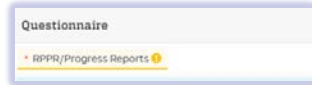
❑ Complete the Subject line in the **Subject** field. The first section of the Subject is the type of Service Request followed by other identifying information that the user will need to input.



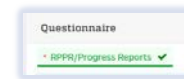
Enter the **due date, department, and PI.**



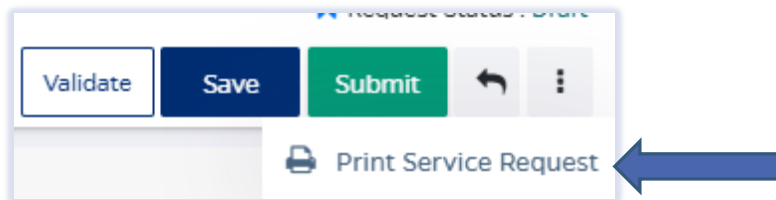
- Click on the **Save** button in the bottom right corner.  The Service Request has now been started and assigned a system number.
- Click on the **Questionnaire** tab and complete all questions on all questionnaires. Each questionnaire will begin as a **yellow** tab. There may be multiple questionnaires.



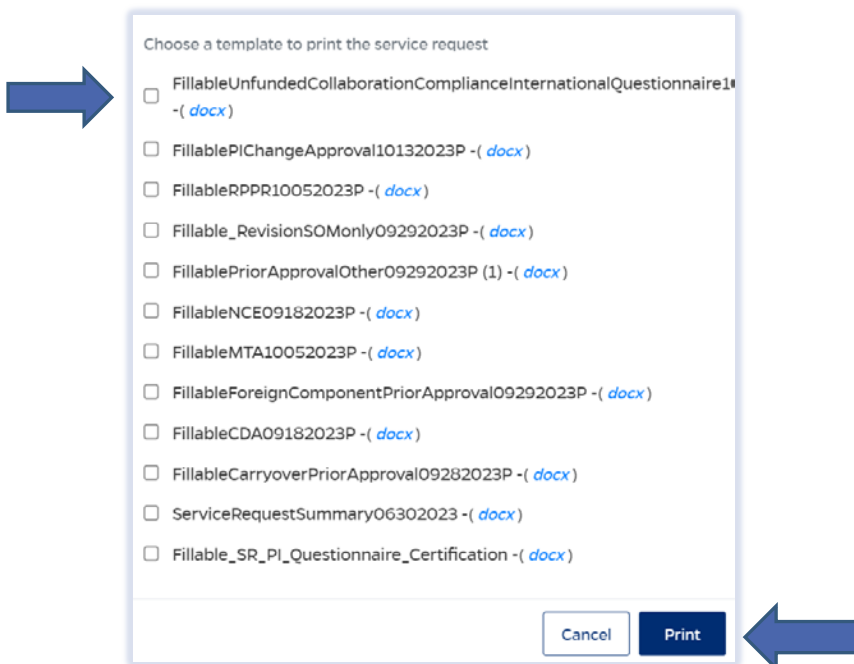
After the questionnaire is completed the tab will change to **green**.



- Click on the **More Actions** button in the upper right corner.
- Click on **Print Service Request**.



- Choose **FillableUnfundedCollaboration** from the list in the dropdown and then click on **Print**.



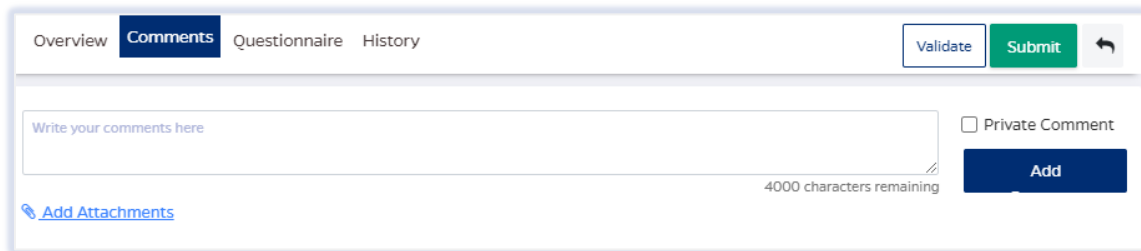
- Send the fillable form to the PI to be completed and signed.

- ❑ Complete all Questionnaire tabs according to the PIs provided answers.
- ❑ Upload the signed fillable form to the Service Request where the PI Certification is requested.

If additional information or attachments need to be added:

- ❑ Click on the **Comments** tab.

The following files under 50 MB are supported: pdf, doc, docx, csv, xml, ppt, pptx, txt, xls, xlsx, zip, json, xlsx, xsm, jpg, msg.



The screenshot shows a web interface with a navigation bar containing 'Overview', 'Comments', 'Questionnaire', and 'History'. The 'Comments' tab is active. In the top right corner, there are 'Validate' and 'Submit' buttons, along with a refresh icon. Below the navigation bar is a large text input field with the placeholder text 'Write your comments here'. To the right of the input field is a checkbox labeled 'Private Comment'. Below the input field, there is a character count '4000 characters remaining' and an 'Add' button. At the bottom left of the input area, there is a link labeled 'Add Attachments'.

- ❑ Click on the **Validate** button in the upper right corner to determine if further action is required. Fix any errors and evaluate if any warnings require changes. A Service Request can be submitted with warnings, but all errors that display must be fixed before Fibi will be able to route the Service Request for approval.
- ❑ Click on the **Submit** button when ready to submit.



The screenshot shows a web interface with a status indicator 'Request Status : Draft' in blue. Below the status indicator, there are four buttons: 'Validate', 'Save', 'Submit', and a refresh icon.