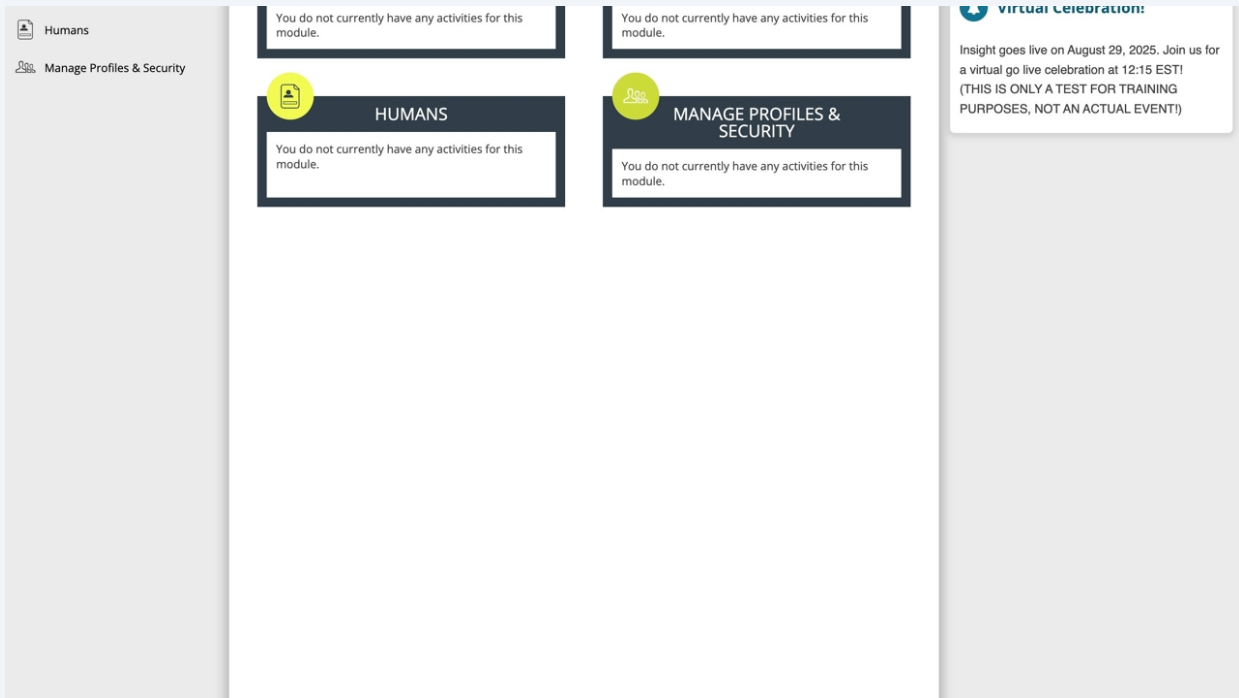


INSIGHT: Trigger DCR from Agreements

1

Navigate to <https://www.google.com/>



2 Click "Agreements"

The screenshot shows the Insight dashboard interface. The sidebar on the left contains a list of modules: Agreements, Disclosures, Humans, and Manage Profiles & Security. The 'Agreements' module is highlighted with a blue background. The main content area displays four cards: AGREEMENTS, DISCLOSURES, HUMANS, and MANAGE PROFILES & SECURITY. Each card has a message: 'You do not currently have any activities for this module.' The top navigation bar includes links for My Profile, Security Help, Institutional Facts, Training Lookup, Help, Feedback, and the version number 1.0.119127. A notification on the right side of the dashboard reads: 'Virtual Celebration! Insight goes live on August 29, 2025. Join us for a virtual go live celebration at 12:15 EST! (THIS IS ONLY A TEST FOR TRAINING PURPOSES, NOT AN ACTUAL EVENT!)'

3 Click "Create Agreement"

The screenshot shows the 'All Agreements/Proposals' page in the Insight dashboard. The sidebar on the left has a list of modules: AGREEMENTS, Action Required, Search By, All Agreements/Proposals, Deliverables, Actions, Disclosures, Humans, and Manage Profiles & Security. The 'Actions' module is highlighted with a blue background, and the 'Create Agreement' button is circled in orange. The main content area displays a table of agreements with columns: Agreement #, PI Name, Sponsor/Company, Organization, Project Title, Overall Status, Record Type, Project ID, and Status. The table contains 14 rows of data. The top navigation bar includes links for My Profile, Security Help, Institutional Facts, Training Lookup, Help, Feedback, and the version number 1.0.119127. A notification on the right side of the dashboard reads: 'Virtual Celebration! Insight goes live on August 29, 2025. Join us for a virtual go live celebration at 12:15 EST! (THIS IS ONLY A TEST FOR TRAINING PURPOSES, NOT AN ACTUAL EVENT!)'

Agreement #	PI Name	Sponsor/Company	Organization	Project Title	Overall Status	Record Type	Project ID	Status
2025A086872	Kraft, Colleen S	MERCK SHARP & DOHME CORP	736000	Sinking sand	Development	Proposals and Funded Agreements		
2025A086868	Kraft, Colleen S		736000	Exciting Lab Stuff	Development	Proposals and Funded Agreements		
2025A086861	Kraft, Colleen S		736000		Development	Proposals and Funded Agreements		
2025A086854	Kraft, Colleen S		736000	Rainbows and Sunshine company	Development	External Activities Request		
2025A086849	Kraft, Colleen S		736000		Development	Proposals and Funded Agreements		
2025A086846	Rothbaum, Barbara O	MERCK AND COMPANY	737025	Wednesday Morning in August	Development	Proposals and Funded Agreements		
2025A086829	Kraft, Colleen S	NIH NATL CANCER INSTITUTE	736000	Pathology	Development	Proposals and Funded Agreements		
2025A086561	Kraft, Colleen S	GLAXOSMITHKLINE INST FOR DIGESTIVE HLTH	736000	Test 8122025	Development	Data Use Agreement		
2025A086529	Kraft, Colleen S	HARVARD UNIVERSITY	736000	Test Test Test	Pending	Data Use Agreement		
2025A086523	Kraft, Colleen S	NIH NATL CANCER INSTITUTE	736000		Development	Proposals and Funded Agreements		
2025A086460	Kraft, Colleen S		736000	Florida is the flattest state	Development	External Activities Request		
2025A086445	Kraft, Colleen S		733025	Test External Activity 1	Development	External Activities Request		

4

Click the "Yes, I am submitting an application for a grant, contract, or cooperative agreement" field.

Colleen K THIS IS A TEST ENVIRONMENT My Profile Security Help Institutional Facts Training Lookup Help Feedback 1.0.119127 insight

AGREEMENTS

Action Required 0

Search By

All Agreements/Proposals

Deliverables

Actions

Create Agreement

Disclosures

Humans

Manage Profiles & Security

Create Agreement

Answering the question(s) below will pair your proposal with the right folks to execute it.

Proposals and Funded Agreements

Are you submitting an application for a grant, contract, or cooperative agreement?

☒ Yes, I am submitting an application for a grant, contract, or cooperative agreement

☐ No, I am submitting an application for a grant, contract, or cooperative agreement

Material Transfer Agreements

Are you submitting an agreement related to the transfer of materials or materials and data to or from an external company or institution?

☐ Yes, I am submitting an agreement related to the transfer of materials or materials and data.

☐ No, I am submitting an agreement related to the transfer of materials or materials and data.

Data Use Agreement

Are you submitting an agreement related to the use of incoming or outgoing data?

☐ Yes, I am submitting an agreement related to the use of incoming or outgoing data

☐ No, I am submitting an agreement related to the use of incoming or outgoing data

Confidential Disclosure Agreements

Are you submitting an agreement related to the protection of confidential information?

☐ Yes, I am submitting an agreement related to the protection of confidential information

☐ No, I am submitting an agreement related to the protection of confidential information

External Activities

Are you submitting a record related to external activities?

☐ Yes, I am submitting a record related to external activities

☐ No, I am submitting a record related to external activities

Collaborative Research Agreement (No external funding)

Are you submitting a collaborative research agreement with no funding?

☐ Yes, I am submitting a collaborative research agreement with no funding

☐ No, I am submitting a collaborative research agreement with no funding

Close panel

Checklist

All validations in this area have been completed

5

Click the "New" field.

Actions

Create Agreement

Disclosures

Humans

Manage Profiles & Security

Are you submitting an application for a grant, contract, or cooperative agreement?

☒ Yes, I am submitting an application for a grant, contract, or cooperative agreement

☐ No, I am submitting an application for a grant, contract, or cooperative agreement

Confidential Disclosure Agreements

Are you submitting an agreement related to the protection of confidential information?

☐ Yes, I am submitting an agreement related to the protection of confidential information

☐ No, I am submitting an agreement related to the protection of confidential information

External Activities

Are you submitting a record related to external activities?

☐ Yes, I am submitting a record related to external activities

☐ No, I am submitting a record related to external activities

Collaborative Research Agreement (No external funding)

Are you submitting a collaborative research agreement with no funding?

☐ Yes, I am submitting a collaborative research agreement with no funding

☐ No, I am submitting a collaborative research agreement with no funding

Please select your proposal type

☒ New

☐ Competing Renewal - New or Resubmission

☐ Resubmission - New

☐ Supplement

Who is the Emory Principal Investigator (PI) for this agreement? Please enter "last name, first name" to search

Start typing to initiate search

Please confirm the correct organization/department for this record

Cancel SAVE CREATE

6

Click the "Who is the Emory Principal Investigator (PI) for this agreement? Please enter "last name, first name" to search *" field.

Actions | **Create Agreement**

Disclosures

Humans

Manage Profiles & Security

Are you submitting an application for a grant, contract, or cooperative agreement?

☒ Yes, I am submitting an application for a grant, contract, or cooperative agreement

Are you submitting an agreement related to the transfer of materials or materials and data to or from an external company or institution?

☐ Yes, I am submitting an agreement related to the transfer of materials or materials and data.

related to the use of incoming or outgoing data?

☐ Yes, I am submitting an agreement related to the use of incoming or outgoing data

Confidential Disclosure Agreements

Are you submitting an agreement related to the protection of confidential information?

☐ Yes, I am submitting an agreement related to the protection of confidential information

External Activities

Are you submitting a record related to external activities?

☐ Yes, I am submitting a record related to external activities

Collaborative Research Agreement (No external funding)

Are you submitting a collaborative research agreement with no funding?

☐ Yes, I am submitting a collaborative research agreement with no funding

Please select your proposal type

☒ New

☐ Competing Renewal - New or Resubmission

☐ Resubmission - New

☐ Supplement

Who is the Emory Principal Investigator (PI) for this agreement? Please enter "last name, first name" to search

Start typing to initiate search

Please confirm the correct organization/department for this record

Cancel SAVE CREATE

7

Type "kraft"

8 Click "P1257710"

+

Actions

Create Agreement

Disclosures

Humans

Manage Profiles & Security

Are you submitting an application for a grant, contract, or cooperative agreement?

☒ Yes, I am submitting an application for a grant, contract, or cooperative agreement

Are you submitting an agreement related to the transfer of materials or materials and data to or from an external company or institution?

☐ Yes, I am submitting an agreement related to the transfer of materials or materials and data.

related to the use of incoming or outgoing data?

☐ Yes, I am submitting an agreement related to the use of incoming or outgoing data

Confidential Disclosure Agreements

Are you submitting an agreement related to the protection of confidential information?

☐ Yes, I am submitting an agreement related to the protection of confidential information

External Activities

Are you submitting a record related to external activities?

☐ Yes, I am submitting a record related to external activities

Collaborative Research Agreement (No external funding)

Are you submitting a collaborative research agreement with no funding?

☐ Yes, I am submitting a collaborative research agreement with no funding

Kraft, Christina M	P7082175	The Emory Clinic > Unassigned > Healthcare > TEC Rad Onc Proton Trmt Ctr	515060
Kraft, Colleen S	P1257710	Emory University > School of Medicine > Pathology > SOM: Pathology: Admin	736000
Kraft, Jacqueline	P6236532	Emory University > School of Medicine > Neurology > SOM: Neurology: Admin	733505
Kraft, Kyle B	P4291605	The Emory Clinic > Unassigned > Healthcare > TEC Critical Care EUH 2D ICU	529070
Kraft, Markus	P8235708	Saint Joseph's Hospital > Unassigned > Healthcare > SJH Facilities Management	438010
Kraft, Michael C	P0486577	Emory University > School of Medicine > Family & Preventive Medicine > SOM: FPM: Family Medicine	731525
Kraftchick, Steven	P6463230	Emory University > EVP Business & Administration > Human Resources > HR: Retiree (HR Use Only)	169902

Please confirm the correct organization/department for this record

Cancel

SAVE

CREATE

9 Click "Create"

+

Actions

Create Agreement

Disclosures

Humans

Manage Profiles & Security

Confidential Disclosure Agreements

Are you submitting an agreement related to the protection of confidential information?

☐ Yes, I am submitting an agreement related to the protection of confidential information

External Activities

Are you submitting a record related to external activities?

☐ Yes, I am submitting a record related to external activities

Collaborative Research Agreement (No external funding)

Are you submitting a collaborative research agreement with no funding?

☐ Yes, I am submitting a collaborative research agreement with no funding

Please select your proposal type

☒ New

☐ Competing Renewal - New or Resubmission

☐ Resubmission - New

☐ Supplement

Who is the Emory Principal Investigator (PI) for this agreement? Please enter "last name, first name" to search

Please confirm the correct organization/department for this record

Note: if you are attempting to submit to procurement, please contact the procurement office for your agreement submission.

Cancel

SAVE

CREATE

10 Click the "Enter a title" field.

The screenshot displays the 'insight' system interface. The top navigation bar includes the user 'Colleen K', a 'THIS IS A TEST ENVIRONMENT' warning, and links for 'My Profile', 'Security Help', 'Institutional Facts', 'Training Lookup', 'Help', 'Feedback', and the version '1.0.119127'. The left sidebar is titled 'AGREEMENTS' and contains sections for 'Action Required' (0), 'Search By' (All Agreements/Proposals, Deliverables), and a list of items for '2025A086926' including Project Information, Related Records (0), Agreement Details, Sponsor, Compliance, Intake Questionnaire, Staff, Attachments, Deliverables, Summary Notes, and Actions. The main content area is titled 'Kraft' and shows 'IR Draft v0.1' with fields for PI (Kraft, Colleen S (P1257710)), Sponsor, Agreement # (2025A086926), Project ID, Project Period, Status (Development), Project IDs, Budget Period, and Record Type (Proposals and Funded Agr...). Below this is the 'Agreement Details' section with a confirmation prompt and a dropdown menu. The 'Enter a title' field is highlighted with an orange circle. Below it is a question 'Will this project include subcontracts to other institutions?' with 'Yes' and 'No' radio buttons. The right sidebar contains a 'Close panel' button, a 'Draft (1)' section with a '2025' dropdown, 'Initial Review (IR) Draft' status, creation and update timestamps, an 'Activity: Submit' section, 'Instructions', a 'Submission Checklist' with the prompt 'Enter a title. Indicate if this project will include subcontractors to other institutions.', a 'Submit Checklist' with a 'Please select a review action' prompt, a 'Workflow History' section showing a record from 08/13/25, and a 'Notes' section.

11 Type "Trigger DCR out of Proposals"

12 Click the "No" field.

AGREEMENTS

2025A086926 **IR** Draft v0.1

PI: Kraft, Colleen S (P1257710) Sponsor: Agreement #: 2025A086926
Project ID: Project Period: Status: Development
Project IDs: Budget Period: Record Type: Proposals and Funded Agr...

Agreement Details

Please confirm the correct organization/department for this record
SOM: Pathology: Admin 736000 Emory University

Enter a title
Trigger DCR out of Proposals

Will this project include subcontracts to other institutions?
☐ Yes ☒ No

Close panel

Draft (1)

2025

Initial Review (IR) **Draft** Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

Indicate if this project will include subcontractors to other institutions

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

13 Click "Next >"

2025A086926 **IR**

Project Information

Related Records

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

Deliverables

Summary Notes

Actions

Disclosures

Humans

Manage Profiles & Security

Please confirm the correct organization/department for this record
SOM: Pathology: Admin 736000 Emory University

Enter a title
Trigger DCR out of Proposals

Will this project include subcontracts to other institutions?
☐ Yes ☒ No

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Submit Actions

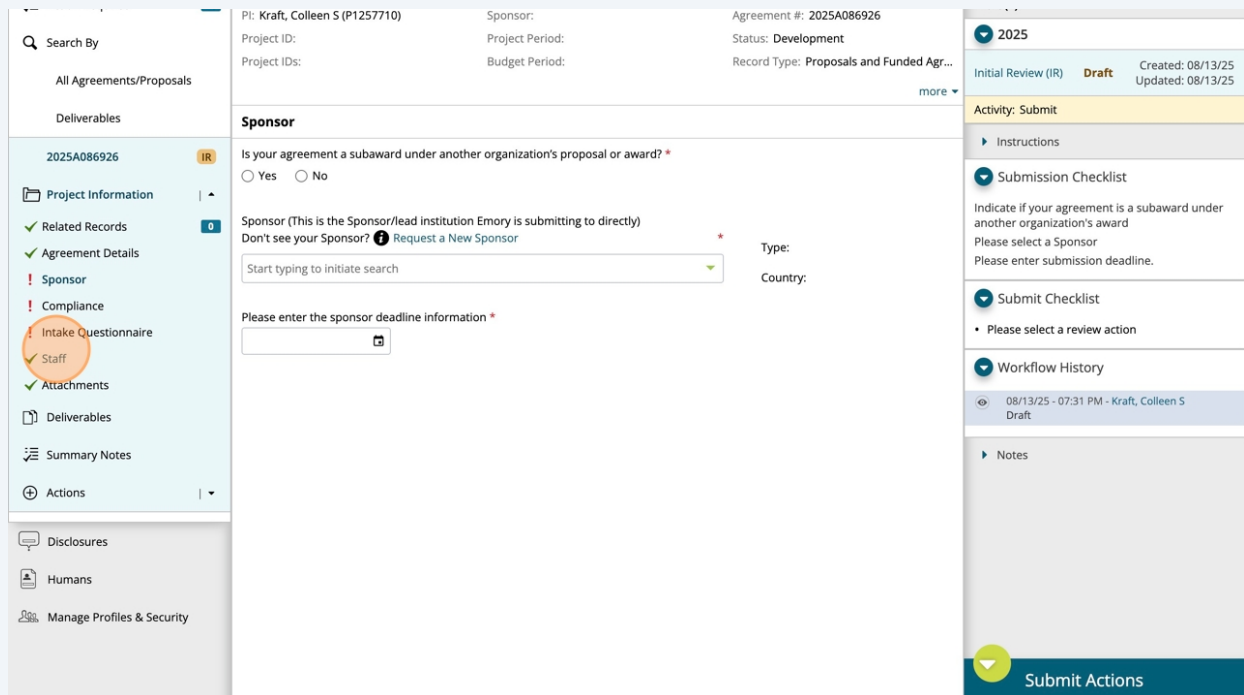
Withdraw

Submit

SAVE SIGN OFF

< Previous Next >

14 Click "Staff"



Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information

Related Records

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

Deliverables

Summary Notes

Actions

Disclosures

Humans

Manage Profiles & Security

PI: Kraft, Colleen S (P1257710)

Sponsor:

Project ID:

Project Period:

Project IDs:

Budget Period:

Agreement #: 2025A086926

Status: Development

Record Type: Proposals and Funded Agr...

more

Sponsor

Is your agreement a subaward under another organization's proposal or award? *

☐ Yes ☐ No

Sponsor (This is the Sponsor/lead institution Emory is submitting to directly)

Don't see your Sponsor? [Request a New Sponsor](#)

Type:

Country:

Please enter the sponsor deadline information *

Submit Actions

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

Indicate if your agreement is a subaward under another organization's award

Please select a Sponsor

Please enter submission deadline.

Submit Checklist

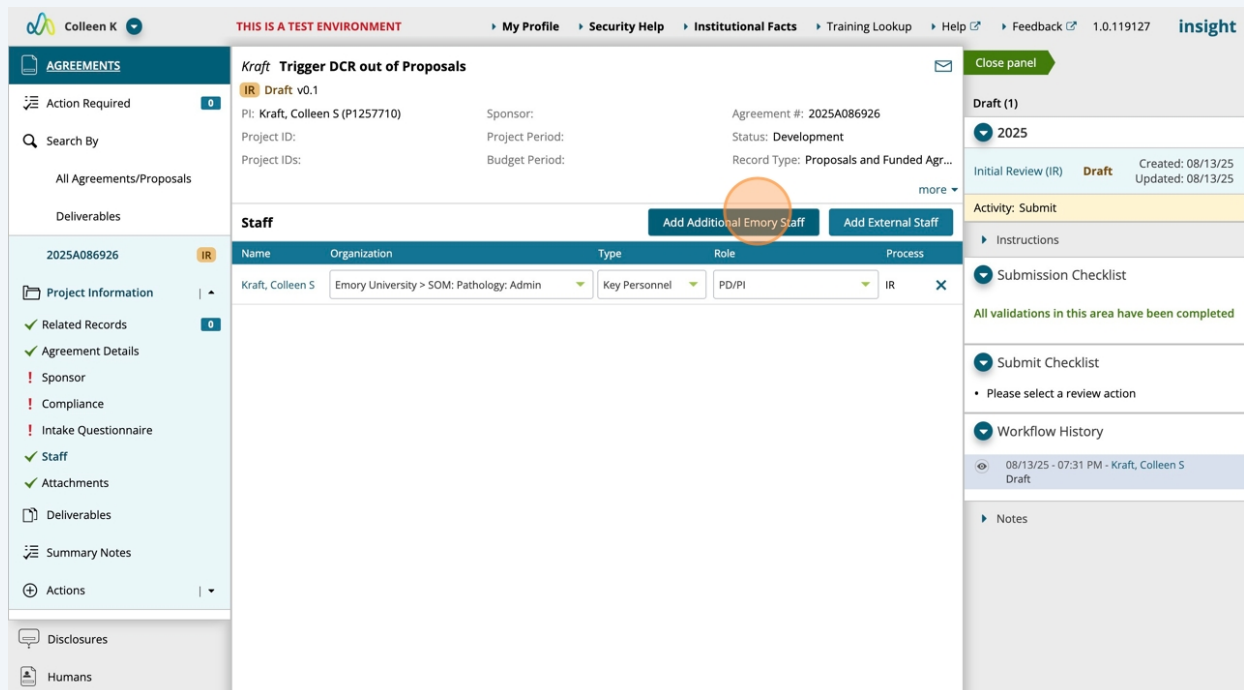
Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

15 Click "Add Additional Emory Staff"



Colleen K

THIS IS A TEST ENVIRONMENT

My Profile Security Help Institutional Facts Training Lookup Help Feedback 1.0.119127 insight

AGREEMENTS

Action Required

Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information

Related Records

Agreement Details

Sponsor

Compliance

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Staff

Attachments

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Summary Notes

Actions

Disclosures

Humans

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710)

Sponsor:

Project ID:

Project Period:

Project IDs:

Budget Period:

Agreement #: 2025A086926

Status: Development

Record Type: Proposals and Funded Agr...

more

Staff

Add Additional Emory Staff

Add External Staff

Name	Organization	Type	Role	Process
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Personnel	PD/PI	IR

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

16 Click "Search for users"

The screenshot displays the Insight platform interface. The top navigation bar includes the user name 'Colleen K', a status indicator 'THIS IS A TEST ENVIRONMENT', and various menu items like 'My Profile', 'Security Help', 'Institutional Facts', 'Training Lookup', 'Help', 'Feedback', and the version '1.0.119127'. The left sidebar shows a navigation menu with 'AGREEMENTS' at the top, followed by 'Action Required', 'Search By', 'All Agreements/Proposals', 'Deliverables', and a list of project IDs including '2025A086926'. The main content area is titled 'Kraft Trigger DCR out of Proposals' and shows details for 'Draft v0.1'. It includes fields for 'PI: Kraft, Colleen S (P1257710)', 'Sponsor', 'Agreement #: 2025A086926', 'Project ID', 'Project Period', 'Status: Development', 'Project IDs', 'Budget Period', and 'Record Type: Proposals and Funded Agr...'. Below this, the 'Staff' section is visible, featuring a search bar with the text 'Search for users' and an orange circle highlighting it. The search bar has 'Add' and 'Cancel' buttons. Below the search bar is a table with columns: Name, Organization, Type, Role, and Process. The table contains one row: 'Kraft, Colleen S', 'Emory University > SOM: Pathology: Admin', 'Key Personnel', 'PD/PI', and 'IR'. The right sidebar contains a 'Close panel' button, a 'Draft (1)' section, a '2025' dropdown, 'Initial Review (IR)' status, 'Draft' status, 'Created: 08/13/25', 'Updated: 08/13/25', 'Activity: Submit', 'Instructions', 'Submission Checklist', 'All validations in this area have been completed', 'Submit Checklist', 'Please select a review action', 'Workflow History', and a 'Notes' section.

17 Type "harms, lauren"

18

Click "Emory Healthcare Shared Svcs > Unassigned > Healthcare > EHI_DIG Digital Operations"

Colleen K THIS IS A TEST ENVIRONMENT My Profile Security Help Institutional Facts Training Lookup Help Feedback 1.0.119127 insight

AGREEMENTS

Action Required 0

Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information

Related Records 0

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

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Summary Notes

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Disclosures

Humans

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710) Sponsor: Agreement #: 2025A086926

Project ID: Project Period: Status: Development

Project IDs: Budget Period: Record Type: Proposals and Funded Agr...

more

Staff

harms, lauren

Add Cancel

Name	Organization	Type	Role	Process
Harms, Lauren A	P5333781	Emory Healthcare Shared Svcs > Unassigned > Healthcare > EHI_DIG Digital Operations	442560	
Harms, Lauren A	P5333781	Emory University > School of Medicine > Support Units > SOM: Information Tech Service	721600	

Role PD/PI Process IR

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

19

Click "Add"

Colleen K THIS IS A TEST ENVIRONMENT My Profile Security Help Institutional Facts Training Lookup Help Feedback 1.0.119127 insight

AGREEMENTS

Action Required 0

Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information

Related Records 0

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

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Summary Notes

Actions

Disclosures

Humans

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710) Sponsor: Agreement #: 2025A086926

Project ID: Project Period: Status: Development

Project IDs: Budget Period: Record Type: Proposals and Funded Agr...

more

Staff

Harms, Lauren A (P5333781)

Add Cancel

Name	Organization	Type	Role	Process
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Personnel	PD/PI	IR

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

20 Click "Select..."

Colleen K THIS IS A TEST ENVIRONMENT My Profile Security Help Institutional Facts Training Lookup

Staff was successfully added.

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

Please, select role and type for each person

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710) Sponsor: Agreement #: 2025A086926

Project ID: Project Period: Status: Development

Project IDs: Budget Period: Record Type: Proposals and Funded Agr...

more

Staff

Add Additional Emory Staff Add External Staff

Name	Organization	Type	Role	Process
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Select...	Select...	IR X
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Person...	PD/PI	IR X

21 Click "Key Personnel"

Colleen K THIS IS A TEST ENVIRONMENT My Profile Security Help Institutional Facts Training Lookup

Staff was successfully added.

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

Please, select role and type for each person

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710) Sponsor: Agreement #: 2025A086926

Project ID: Project Period: Status: Development

Project IDs: Budget Period: Record Type: Proposals and Funded Agr...

more

Staff

Add Additional Emory Staff Add External Staff

Name	Organization	Type	Role	Process
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Select...	Select...	IR X
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Personnel	PD/PI	IR X

22 Click "Save"

2025A086926 IR

Project Information | 0

Related Records

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

Deliverables

Summary Notes

Actions

Disclosures

Humans

Manage Profiles & Security

Name	Organization	Type	Role	Process
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Key Person...	Select...	IR
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Person...	PD/PI	IR

< Previous

Next >

Instructions

Submission Checklist

Please, select role and type for each person

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S
Draft

Notes

Submit Actions

Withdraw

Submit

SAVE SIGN OFF

23 Click this field.

Colleen K

THIS IS A TEST ENVIRONMENT

My Profile Security Help Institutional Facts Training Lookup Help Feedback 1.0.119127 insight

AGREEMENTS

Action Required 0

Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information | 0

Related Records

Agreement Details

Sponsor

Compliance

Intake Questionnaire

Staff

Attachments

Deliverables

Summary Notes

Actions

Disclosures

Humans

Kraft Trigger DCR out of Proposals

IR Draft v0.1

PI: Kraft, Colleen S (P1257710)

Sponsor:

Agreement #: 2025A086926

Project ID:

Project Period:

Status: Development

Project IDs:

Budget Period:

Record Type: Proposals and Funded Agr...

more

Staff

Add Additional Emory Staff

Add External Staff

Name	Organization	Type	Role	Process
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Person...	PD/PI	IR
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Key Person...	Select...	IR

Close panel

Draft (1)

2025

Initial Review (IR) Draft Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

Please, select role and type for each person

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S
Draft

Notes

24 Click "Co-Investigator"

The screenshot shows a web application interface for managing proposals. The main title is "Kraft Trigger DCR out of Proposals". Below the title, there are fields for "PI: Kraft, Colleen S (P1257710)", "Sponsor:", "Project ID:", "Project Period:", "Project IDs:", "Budget Period:", "Agreement #: 2025A086926", "Status: Development", and "Record Type: Proposals and Funded Agr...".

The "Staff" section contains a table with columns: Name, Organization, Type, Role, and Process. The table has two rows:

Name	Organization	Type	Role	Process
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Person...	PD/PI	IR
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Key Person...	Select...	IR

A dropdown menu is open for the "Role" column of the second row, showing options: PD/PI, Co-Investigator, Project Manager, Other, Consultant, Secretarial/Clerical, Mentor, and Co-Mentor. The "Co-Investigator" option is highlighted with an orange circle.

The left sidebar contains a list of actions: Action Required, Search By, All Agreements/Proposals, Deliverables, Project Information, Related Records, Agreement Details, Sponsor, Compliance, Intake Questionnaire, Staff, Attachments, Deliverables, Summary Notes, Actions, Disclosures, Humans, and Manage Profiles & Security.

The right sidebar contains a "Close panel" button, a "Draft (1)" section, a "2025" section, a "Initial Review (IR) Draft" section, a "Submit" section, a "Submission Checklist" section, a "Submit Checklist" section, a "Workflow History" section, and a "Notes" section.

25 Click "Save"

The screenshot shows the same web application interface as the previous one, but with the "Co-Investigator" role selected for the second row in the "Staff" table. The "Role" column now shows "Co-Investigator" instead of "Select...".

The "Submit Actions" section at the bottom right contains a "Withdraw" button and a "Submit" button. The "Submit" button is highlighted with an orange circle.

The "Workflow History" section shows a record for "08/13/25 - 07:31 PM - Kraft, Colleen S Draft".

The "Notes" section is empty.

The "Previous" and "Next" buttons are visible at the bottom of the form.

26 Click "Staff"

Search By

All Agreements/Proposals

Deliverables

2025A086926 IR

Project Information

Related Records

Agreement Details

Sponsor

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Humans

Manage Profiles & Security

Pi: Kraft, Colleen S (P1257710)

Sponsor:

Agreement #: 2025A086926

Project ID:

Project Period:

Status: Development

Project IDs:

Budget Period:

Record Type: Proposals and Funded Agr...

more

Staff

Add Additional Emory Staff

Add External Staff

Name	Organization	Type	Role	Process
Kraft, Colleen S	Emory University > SOM: Pathology: Admin	Key Person...	PD/PI	IR
Harms, Lauren A	Emory Healthcare Shared Svcs > EHI_DIG Digital Operati...	Key Person...	Co-Investigator	IR

2025

Initial Review (IR) **Draft** Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Submit Actions

Withdraw

Submit

SAVE

SIGN OFF

27 Click "Save"

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Manage Profiles & Security

Please confirm the correct organization/department for this record

SOM: Pathology: Admin 736000 Emory University

Enter a title

Trigger DCR out of Proposals

Will this project include subcontracts to other institutions?

☐ Yes
 ☒ No

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Submit Actions

Withdraw

Submit

SAVE

SIGN OFF

< Previous

Next >

28 Click "DCR Designation"

Search by

All Agreements/Proposals

Deliverables

2025A086926 IR

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Manage Profiles & Security

Project IDs:

Budget Period:

Record Type: Proposals and Funded Agr...

more

Sponsor

Is your agreement a subaward under another organization's proposal or award? *

☐ Yes ☒ No

Sponsor (This is the Sponsor/lead institution Emory is submitting to directly)
Don't see your Sponsor? [Request a New Sponsor](#)

MERCK AND COMPANY

x

Type: Corporate

Country: USA

Please enter the sponsor deadline information *

08/21/25

x

📅

Major Goals: Please provide 2-3 sentences of text that describe the major goals of the project.
This will be utilized on your Other Support. Please do not list "TBD". *

TBD, test

Please upload a copy of the opportunity guidelines *

Change Control Request Change on Feed to External Activities_7_16_2025.docx

Uploaded

x

Initial Review (IR) **Draft** Created: 08/13/25 Updated: 08/13/25

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Submit Actions

Withdraw

29 Click "Deliverables"

Deliverables

2025A086926 IR

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DCR Designation

Initiate COI Process

Name	Type	Process	Date Added	DCR	COI Status	Disclosures Profile Last Updated Date
Colleen Kraft	Key Personnel	IR	08/13/25	<input checked="" type="radio"/> Yes <input type="radio"/> No	Not Required	08/13/25
Lauren Harms	Key Personnel	IR	08/13/25	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A	Not up to date

Activity: Submit

Instructions

Submission Checklist

All validations in this area have been completed

Submit Checklist

Please select a review action

Workflow History

08/13/25 - 07:31 PM - Kraft, Colleen S Draft

Notes

Submit Actions

Withdraw

Submit