Non-funded negotiations include Confidential Disclosure Agreements (CDA), Data Use Agreements (DUA), and Material Transfer Agreements (MTA). This job aid walks through the steps to initiate these types of agreements in InfoEd. To begin, login to InfoEd with your NetID and password.

In the left-hand menu, click Sponsored Projects. Then click Proposal in the Create New menu.

Note: If you do not see the option to create a new proposal, you may need to submit a security request from.

**COMPLETE THE NEW PROPOSAL QUESTIONNAIRE**

1. Click Change to change the PI for the agreement. Search for the PI by first or last name.


3. Select Non-Funded Negotiation as the Proposal Type. This step is important so the correct submission route is utilized.

4. Fill out the Sponsor with the organization which Northwestern will negotiate the agreement. In this case, Sponsor does NOT mean source of research funding.

   Note: Use ZZZ if the organization does not exist and submit a request to Sponsored Research to add the sponsor.

5. Step 4 will be auto-completed. Complete steps 5-7 and review for accuracy. Then click Create Proposal.
From the Submission Mechanism drop-down, select the type of non-funded negotiation you wish to initiate (i.e. CDA, DUA, or MTA).

Once the questions and uploads are complete, tick the Complete checkbox and then click Save.

Note: If you need to make edits you can un-check the Complete checkbox on any page.

Use the job aids below for detailed information on how to complete a CDA, DUA, or MTA request form:

- How to Request a CDA
- How to Request a DUA
- How to Request a MTA
Once the new PI is selected, click the **Add New PI** button.

Once the previous sections are complete as indicated by the **checkmarks**, the agreement request can be **Finalized**.

Click the **Build** button to initiate the finalization process.

**Assemble Application** allows you to select a sequence order for the components if needed.

Submit to Sponsored Research by by clicking the **thumbs up icon** next to Submit Final Review.

**Note:** Submitting the record notifies the appropriate team to begin negotiation. It’s possible the record will be sent back to you for edits or additional information using workflow/action items in InfoEd.

Search for the new PI by name.

The PI can be updated on the **Generic Face Page** if it was not done when the record was created or if the PI has changed in the interim.

Tick the **Completed checkbox** once the correct information is on the page.

(If applicable) replace the PI using the **Change** link.