

RIT Sponsored Research Services
Novelution PI Manual - Non-Financial Agreement Request Processes

This manual will guide RIT faculty and staff needing to request the following types of non-financial agreements:

- Non-disclosure agreements (NDA)
- Data Usage Agreements (DUA)
- Materials Transfer Agreements (MTAs)
- Other NFA:
 - Equipment agreements
 - Teaming Agreements
 - Memos of Understanding (MOUs)

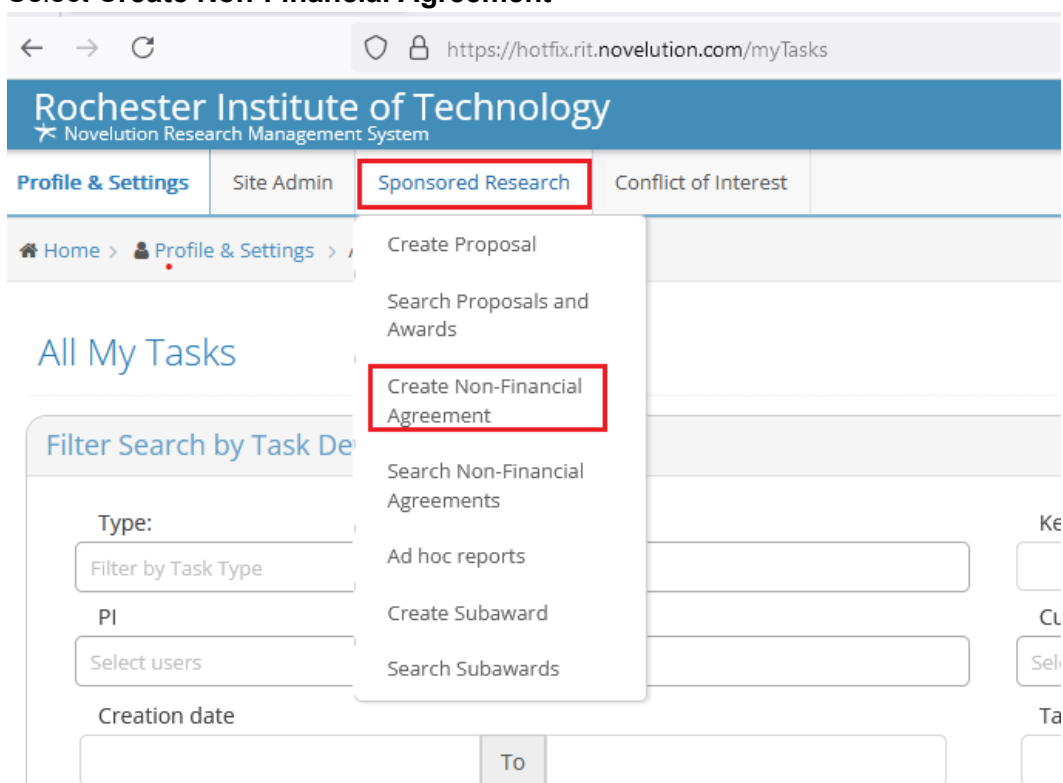
The PI must complete the steps below, which include:

- Creating an NFA Request
- Completing the required information in the Primary Info panel
- Answering applicable compliance questions (similar to proposals)
- Completing a PI attestation
- Submitting the request to SRS

STEP 1

To request one of these agreement types:

1. **Login** to Novelution <https://rit.novelution.com/login>
2. Navigate to the **Sponsored Research** tab
3. Select **Create Non-Financial Agreement**



STEP 2

1. The **Non-Financial Agreement** main window will open
2. Enter the **Purpose of Exchange/Description**
3. If entering on behalf of someone, select the **PI**. *Note: if entering yourself, this will automatically select your name*
4. The **College/Division/Department/Organization** field will auto-populate with the PIs home department.
5. Choose the **Agreement Type**
6. Press **Continue**

Non-Financial Agreement

Primary Information

Purpose of Exchange/Description

Discuss potential collaboration related to 3d printing applications

133 remaining

PI*

DemoUser, PI2

College / Division / Department / Organization*

Advancement Operations (7022) (1)

University Wide > Office of the President > Development - Vice President > Advancement Operations

Agreement Type*

Select one

Material Transfer Agreement

Non-Disclosure Agreement

Data Usage Agreement

Other Non-Financial Agreement

STEP 3 – NDA only



1. A new NFA record will be created for your request. In the example used for this manual, the number is NFA00022509. You may use this number for the life of the agreement to reference your request and check the status of negotiations, expiration date, and to see any modifications.
2. You must enter important information in the Primary Information panel
3. Enter the name of your **Collaborating Organization (change text in Primary Info Panel)**
 - a. **If not in system, you will be directed to create a new sponsor**
4. When returned to Primary Information panel, select the blue **Add Sponsor Contact for Project** button
5. Add at least one **Contact** so that SRS may reach out to the individual(s) for negotiating and executing the NFA.
 - a. Select the contact **Type**
 - b. Enter **First Name**
 - c. Enter **Last Name**
 - d. Enter contact's **Email**
 - e. Enter contact's **Phone**, if known
 - f. Enter an additional information you feel is pertinent in the **Notes** field
 - g. Click the blue **Save** button
6. Enter a **Purpose of Exchange/Description** if you did not in step 2
7. Enter a **Technical Area**. Please be as specific as possible to limit any liability
8. Enter a **Start Date**
9. The **End Date** will default to 12 months from the start date. If you need an alternate date, please enter it.
10. Verify the **Agreement Type** is correct
11. The Primary Info window should look similar to the screen shot below

✓ NFA00022509 : PIZ DemoUser / IFA / Advancements Operations (7022) / Demo / Discuss potential collaboration related to 3d pri...

• If filing an NDA request, the Principal Investigator (PI) should seek to limit the scope and duration of confidential disclosures. A BNDA is a binding legal agreement under which RIT assumes liability for protecting confidential information.
 • The PI is responsible for controlling access to materials provided by or confidential information disclosed by the partner. Any confidential information received must be clearly marked or labeled - see RIT's Information Security website, <http://security.rit.edu/> for more details.
 • The Vice President for Research is the only RIT Authorized Signatory for research related NFAs.

Collaborator: Demo Company (Demo)

Sponsor Contacts: Add Sponsor Contact for Project

Type	First Name	Last Name	Email	Phone	Ext.	Position Title	Action
Administrative Contact	John	Doe	jd@demo.com				 

NFA# NFA00022509

Purpose of Exchange/Description: Discuss potential collaboration related to 3d printing applications

133 remaining

Technical Area*: 3D laser printing using metallic inks

Agreement Dates

Start*: 07/02/2025

End: 07/01/2026

Agreement Type*: Non-Disclosure Agreement

STEP 3 – MTA only

1. A new NFA record will be created for your request. In the example here, the number is NFA00022509. You may use this number for the life of the agreement to reference your request and check the status of negotiations, expiration date, and to see any modifications.
2. You must enter important information in the Primary Information panel
3. Enter the name of your **Collaborating Organization (change text in Primary Info Panel)**
 - a. **If not in system, you will be directed to create a new sponsor**
4. When returned to Primary Information panel, select the blue **Add Sponsor Contact for Project** button
5. Add at least one **Contact** so that SRS may reach out to the individual(s) for negotiating and executing the NFA.
 - a. Select the contact **Type**
 - b. Enter **First Name**
 - c. Enter **Last Name**
 - d. Enter contact's **Email**
 - e. Enter contact's **Phone**, if known
 - f. Enter an additional information you feel is pertinent in the **Notes** field
 - g. Click the blue **Save** button
6. Enter a **Purpose of Exchange/Description** if you did not in step 2
7. Enter a **Start Date**
8. The **End Date** will default to 12 months from the start date. If you need an alternate date, please enter it.
9. Verify the **Agreement Type** is correct
10. Enter a **Description of Material**
11. Enter **Material Location on RIT Campus**, be specific as possible by including the building and room number.
12. The Primary Info window should look similar to the screen shot below

NFA00022509 : PI2 DemoUser - FA / Advancements Operations (7022) / Demo / Receiving 3D printing parts for testing

Collaborator: Demo Company (Demo)

Sponsor Contacts: [Add Sponsor Contact for Project](#)

Type	First Name	Last Name	Email	Phone	Ext.	Position Title	Action
Administrative Contact	John	Doe	jd@demo.com				Edit Delete

NFA# NFA00022509

Purpose of Exchange/Description: Receiving 3D printing parts for testing
161 remaining

Agreement Dates

Start*: 07/02/2025

End: 07/01/2026

Agreement Type*: Material Transfer Agreement

Description of Material*: Proprietary 3D nozzles

Material Location On RIT Campus*: College Lab 123 - Engineering

STEP 3 – DUA only



1. A new NFA record will be created for your request. In the example here, the number is NFA00022509. You may use this number for the life of the agreement to reference your request and check the status of negotiations, expiration date, and to see any modifications.
2. You must enter important information in the Primary Information panel
3. Enter the name of your **Collaborating Organization (change text in Primary Info Panel)**
 - a. **If not in system, you will be directed to create a new sponsor**
4. When returned to Primary Information panel, select the blue **Add Sponsor Contact for Project** button
5. Add at least one **Contact** so that SRS may reach out to the individual(s) for negotiating and executing the NFA.
 - a. Select the contact **Type**
 - b. Enter **First Name**
 - c. Enter **Last Name**
 - d. Enter contact's **Email**
 - e. Enter contact's **Phone**, if known
 - f. Enter an additional information you feel is pertinent in the **Notes** field
 - g. Click the blue **Save** button
6. Enter a **Purpose of Exchange/Description** if you did not in step 2
7. Enter a **Technical Area**. Please be as specific as possible to limit any liability
8. Enter a **Start Date**
9. The **End Date** will default to 12 months from the start date. If you need an alternate date, please enter it.
10. Verify the **Agreement Type** is correct
11. Enter a **Data Set Description**
12. Enter **Data Location**, be specific as possible by including the building and room number.
13. The Primary Info window should look similar to the screen shot below

NFA00022509 - P12 DemoUser - NFA / Advancement Operations (7022) / Demo / Receiving 3D printing parts for testing

Primary Information

Collaborator: Demo Company (Demo)

Sponsor Contacts: Add Sponsor Contacts for Project

Type	First Name	Last Name	Email	Phone	Ext.	Position Title	Action
Administrative Contact	John	Doe	jd@demo.com				 

NFA# NFA00022509

Purpose of Exchange/Description: Receiving 3D printing parts for testing
161 remaining

Agreement Dates

Start*: 07/02/2025

End: 07/01/2026

Agreement Type*: Data Usage Agreement

Data Set Description*: 3D printing quality output metrics

Data Location*: College Lab 123 - Engineering

STEP 3 – Other NFA type only

1. A new NFA record will be created for your request. In the example here, the number is NFA00022509. You may use this number for the life of the agreement to reference your request and check the status of negotiations, expiration date, and to see any modifications.
2. You must enter important information in the Primary Information panel
3. Enter the name of your **Collaborating Organization (change text in Primary Info Panel)**
 - a. **If not in system, you will be directed to create a new sponsor**
4. When returned to Primary Information panel, select the blue **Add Sponsor Contact for Project** button
5. Add at least one **Contact** so that SRS may reach out to the individual(s) for negotiating and executing the NFA.
 - a. Select the contact **Type**
 - b. Enter **First Name**
 - c. Enter **Last Name**
 - d. Enter contact's **Email**
 - e. Enter contact's **Phone**, if known
 - f. Enter an additional information you feel is pertinent in the **Notes** field
 - g. Click the blue **Save** button
6. Enter a **Purpose of Exchange/Description** if you did not in step 2
7. Enter a **Technical Area**. Please be as specific as possible to limit any liability
8. Enter a **Start Date**
9. The **End Date** will default to 12 months from the start date. If you need an alternate date, please enter it.
10. Verify the **Agreement Type** is correct
11. In the **Additional Information** text field indicate the type of other NFA you are requesting, such as an equipment agreement, a Memo of Understanding, a teaming Agreement or something else.
12. The Primary Info window should look similar to the screen shot below

NFA00022509 : PIZ DemoUser NFA / Advancement Operations (7022) / Demo / Receiving 3D printing parts for testing

Primary Information

Collaborator: Demo Company (Demo)

Sponsor Contacts: Add Sponsor Contact for Project

Type	First Name	Last Name	Email	Phone	Ext.	Position Title	Action
Administrative Contact	John	Doe	jd@demo.com				

NFA# NFA00022509

Purpose of Exchange/Description: Receiving 3D printing parts for testing
161 remaining

Agreement Dates

Start: 07/02/2025
End: 07/01/2026

Agreement Type: Other Non-Financial Agreement

Additional Information: Enter whether this is an MOU, an equipment loan agreement, a Teaming Agreement, or another type of non-financial agreement related to research

STEP 4

1. Navigate to the **Compliances** panel (you can use the shortcuts on the left side of the screen)
2. Answer the compliance question(s)

NOTE: the compliance questions change depending on which type of agreement is being requested. MTAs and DUAs may involve hazardous materials and/or protected data. The compliance questions will ask for the PI to verify whether any of these apply and provide guidance on how to seek assistance. Some answers may require the PI to seek assistance from Research Computing and/or Environmental Health and Safety (EHS). As always, questions may also be directed to postaward@rit.edu

- **NDA and Other NFA Compliance Panel**

- **MTA Compliance Panel**

- **DUA Compliance Panel**

STEP 5

1. Navigate to the **PI Attestation** panel
2. Answer the attestation questions

STEP 6

1. **Connecting an NFA to an existing Sponsored Research record**
 - a. **You will need to know the Novelution number to add**

STEP 7

1. If the collaborator has provided any documents for SRS to review, please attach them in the **File Uploads** panel under **Non-Financial Agreement Contract and other Documents** in the **Other Documents** section

Non-Financial Agreement Contract and other Documents

Scope of Work and Data Security Plan may only be required for MTAs and DUAs

NFA Contracts Drop files here or click to choose

Scope of Work Drop file here or click to choose

Data Security Plan Drop file here or click to choose

Other Documents Drop files here or click to choose

Documents to upload pending save:

For demo.docx

2. At the bottom of the browser window, you will see the three buttons as represented in the screen shot immediately below.

SAVE SUBMIT FOR APPROVAL Check Validations

3. Press the blue **Save** button at the bottom of your screen
4. Then select the green **Check Validations** button
5. If there are errors, please correct and **Check Validations** again.
6. If there are no errors, select the blue **Submit for Approval** button.

STEP 8

1. SRS will now be notified of your request and someone in our office will be assigned to your request. You may login to Novelution and search for your NFA record to check status at any time using the Search Non-Financial Agreements window. Any NFAs on which you are involved will appear in the results at the bottom of the screen.


Rochester Institute of Technology
Novelution Research Management System

Profile & Settings Site Admin **Sponsored Research** Conflict of Interest

[Go to Non-Financial Agreements](#)

Filter Non-Financial Agreements

PI/Co-PI
Select one

Keyword(s) 

Assigned SRS Pre-Award
Start typing...

Current Stage
Select

Agreement Start Date Between
To

☐ Contains DURC/PPP/PEPP
☐ Involves Laboratory Animals
☐ Involves Biosafety
☐ Involves Human Subjects
☐ Contains foreign activities

Search Results [Download Report\(s\)](#)

NFA #	PI Name	Title	Stage
NFA00022509	PI2 DemoUser	Receiving 3D printing parts for testing	Agreement
NFA00022508	PI2 DemoUser	Sharing discussions for possible project	Agreement