UAB
The University of Alabama at Birmingham

Office of Research

Reporting Glossary

AGREEMENTS

OFFICE OF RESEARCH

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How to Use This Guide

This guide helps research administrators, department users, and reporting stakeholders understand how to interpret and use myUABResearch reports. It summarizes each report's purpose, recommended use, data source, module, and commonly referenced fields so users can select the most appropriate report for their needs.

Start with the quick-reference table to identify the report that best matches your reporting needs. Then review the individual report section for a plain-language description, recommended usage, source system, module, and commonly used fields.

Which Report Should I Use?

Report	Best Used When	Module
UAB - Agreements	You need a broad view of agreement records, including agreement details, contracting parties, investigators, statuses, and key lifecycle dates.	Agreements
UAB - Active Clinical Trial Agreements	You need to focus only on active clinical trial agreements and review investigators, sponsors, trial phase, trial type, and active-date information.	Agreements
UAB - Clinical Trial Agreements	You need to review clinical trial agreements across statuses, including submitted, in-process, approved, active, or completed records.	Agreements
UAB - Keyword Search on Agreement Titles	You need to search agreement titles by keyword and quickly review basic agreement details such as status, PI, contracting party, and submitted date.	Agreements
UAB – Subawards	You need a broad view of all existing subaward agreements, including subrecipient information, budgetary period of performance and costs.	Agreements
UAB – Approved Subawards	You need a view of currently active or approved subawards, including budget, costs, and subrecipient information.	Agreements

UAB - Agreements

Description	This report provides information on all agreements, including agreement details, contracting parties, investigators, and key dates in the agreement lifecycle.
Usage	Use this report to track agreements from creation through approval and completion, and to identify responsible investigators, sponsors, and contracting parties.
Criteria	Returns all agreements that currently exist in the system, unconstrained.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Agreement ID	Unique identifier for the agreement.	Yes
Agreement Name	Name or title of the agreement.	Yes
Agreement Type	Type of agreement (e.g., Clinical Trial Agreement).	Yes
Agreement Status	Current status of the agreement (e.g., Draft, Approved, Active).	Yes
PI BlazerID	BID of Principal Investigator associated with the agreement.	Yes
PI Org	Department or organizational unit associated with the principal investigator.	Yes
Contracting Party	External organization or entity involved in the agreement.	Yes
Contracting Party Type	Category of the contracting party (e.g., Industry, College, Government).	Yes
Date Submitted	Date the agreement was submitted for review or processing.	Yes
Date Approved	Date the agreement was approved.	Yes

UAB - Active Clinical Trial Agreements

Description	This report provides information on all active clinical trial agreements, including agreement details, investigators, sponsors, and trial-specific information.
Usage	Use this report to identify active clinical trial agreements and review key details such as investigators, sponsors, study phase, and timeline.
Criteria	Returns all agreements where the agreement state is Active and the agreement type is CTA.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Agreement ID	Unique identifier for the agreement.	Yes
Agreement Name	Name or title of the clinical trial agreement.	Yes
Agreement Status	Current status of the agreement. This report includes Active agreements.	Yes
PI BlazerID	Principal Investigator associated with the clinical trial.	Yes
Associated Department	Department or organizational unit associated with the agreement.	Yes
Contracting Party	External organization involved in the clinical trial agreement.	Yes
Contracting Party Type	Category of contracting party (e.g., Industry, College, Government).	Yes
Study Phase	Phase of the clinical trial (e.g., Phase I, Phase II, Phase III).	Yes
Trial Type	Type of clinical trial (e.g., Drug, Device, Observational).	Yes
Date Active	Date the agreement became active.	Yes

UAB - Clinical Trial Agreements

Description	This report provides information on all clinical trial agreements, including agreement details, investigators, sponsors, and trial-specific information.
Usage	Use this report to review clinical trial agreements at all stages, including in-process and completed agreements, and understand key details such as investigators, trial type, and timeline.
Criteria	Returns all agreements where the agreement type is CTA.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Agreement ID	Unique identifier for the agreement.	Yes
Agreement Status	Current status of the agreement (e.g., Unassigned, Internal Review, Approved, Active).	Yes
PI BlazerID	BlazerID of Principal Investigator associated with the clinical trial.	Yes
Associated Department	Department or organizational unit associated with the agreement.	Yes
Contracting Party	External organization involved in the clinical trial agreement.	Yes
Contracting Party Type	Category of contracting party (e.g., Industry, Foundation, Government).	Yes
Study Phase	Phase of the clinical trial (e.g., Phase I, Phase II, Phase III).	Yes
Trial Type	Type of clinical trial (e.g., Drug, Device, Observational).	Yes
Date Submitted	Date the agreement was submitted for review or processing.	
Date Active	Date the agreement became active.	

UAB - Keyword Search on Agreement Titles

Description	This report provides a searchable view of agreements based on keywords in the agreement name or title, along with key agreement details.
Usage	Use this report to quickly find agreements by keyword and review basic information such as status, investigator, and contracting party.
Criteria	Returns all agreements where the provided keyword matches the agreement title.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Name	Name or title of the agreement. Use this field to search by keywords.	Yes
ID	Unique identifier for the agreement.	Yes
Agreement Type	Category of agreement (e.g., Unfunded Agreement).	Yes
Project Status	Current status of the agreement (e.g., Active, Expired).	Yes
Status Date	Date the agreement status was last updated.	Yes
PI (First)	First name of the principal investigator associated with the agreement.	Yes
PI (Last)	Last name of the principal investigator associated with the agreement.	Yes
Contracting Party	External organization involved in the agreement.	Yes
Contracting Party Category	Category of contracting party (e.g., Industry, Foundation).	Yes
Submitted Date	Date the agreement was submitted for processing.	Yes

UAB – Subawards

Description	This report provides a searchable listing of subaward agreement records (in any state).
Usage	Use this report to quickly list all existing subaward agreements by UAB PI, UAB department, subrecipient, subrecipient PI, sponsor, and more.
Criteria	Returns all agreements where the agreement type is Outgoing Subaward.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Agreement ID	Unique system identifier for the agreement.	Yes
Agreement Name / Description	The title and description of the agreement, summarizing the goal or work to be done by the agreement.	Yes
Agreement Status	The current state of the outgoing subaward agreement.	Yes
PI Last / First Name	The UAB principal investigator (PI) of the subaward agreement.	Yes
PI Org / Org Num.	The primary affiliated department or division of the UAB PI.	Yes
Contracting Party	The external entity or subrecipient receiving funds from UAB.	Yes
outSub Prime Funding Agency	The external entity or direct sponsor providing funds to UAB.	Yes
outSub Subrecipient PI Last / First Name	The PI at the subrecipient institution / entity.	Yes
outSub Budget Period Dates	The budgetary start and end dates of the subaward defining its overall duration.	No
outSub Budget Period Costs	The direct, indirect, and total costs associated with the subaward.	No

UAB – Approved Subawards

Description	This report provides a searchable listing of subaward agreement records that are currently Active or Approved.
Usage	Use this report to quickly list currently active subaward agreements by UAB PI, UAB department, subrecipient, subrecipient PI, sponsor, and more.
Criteria	Returns all agreements where the agreement type is Outgoing Subaward and the current state is Active or Approved.
Data Source	myUABResearch
Module	Agreements

Key Reporting Fields (This report contains additional fields.)

Field Name	Description	Filter?
Agreement ID	Unique system identifier for the agreement.	Yes
Agreement Name / Description	The title and description of the agreement, summarizing the goal or work to be done by the agreement.	Yes
Agreement Status	The current state of the outgoing subaward agreement.	Yes
PI Last / First Name	The UAB principal investigator (PI) of the subaward agreement.	Yes
PI Org / Org Num.	The primary affiliated department or division of the UAB PI.	Yes
Contracting Party	The external entity or subrecipient receiving funds from UAB.	Yes
Prime Funding Agency	The external entity or direct sponsor providing funds to UAB.	Yes
Subrecipient PI Name	The PI at the subrecipient institution / entity.	Yes
Budget Period Dates	The budgetary start and end dates of the subaward defining its overall duration.	No
Budget Period Costs	The direct, indirect, and total costs associated with the subaward.	No

Reporting Best Practices

- Confirm the report scope before using totals or drawing conclusions, especially when the report may include all agreements, only clinical trial agreements, or only active clinical trial agreements.
- Use unique identifiers such as Agreement ID and PI BlazerID when matching agreement records across reports or comparing results with other systems.
- Filter by Agreement Type, Agreement Status, Project Status, or Contracting Party Type before exporting results to ensure the report reflects the intended agreement population.
- Use date fields consistently. Submitted Date, Date Submitted, Date Approved, Date Active, and Status Date represent different points in the agreement lifecycle.
- When reviewing clinical trial agreement reports, distinguish between agreement status, trial phase, trial type, contracting party, and associated department because each field answers a different reporting question.

Definitions

Term	Meaning
Agreement	A myUABResearch record used to track an agreement through its lifecycle, including details such as status, investigators, contracting party, and key dates.
Agreement ID	Unique identifier assigned to an agreement record.
Agreement Name	Name or title of the agreement. This field may be used for keyword searches when available.
Agreement Type	Category that identifies the kind of agreement, such as a clinical trial agreement or unfunded agreement.
Agreement Status	Current lifecycle status of the agreement, such as submitted, in review, approved, active, expired, or completed.
Clinical Trial Agreement	An agreement associated with a clinical trial, often including trial-specific fields such as study phase and trial type.
Contracting Party	External organization or entity involved in the agreement.

Contracting Party Type	Category assigned to the contracting party, such as industry, college, foundation, or government.
PI	Principal Investigator associated with the agreement or clinical trial.
PI BlazerID	BlazerID of the Principal Investigator associated with the agreement.
Study Phase	Phase of the clinical trial, when applicable.
Trial Type	Type of clinical trial, such as drug, device, or observational, when applicable.

Can't find what you are looking for?

If the report you need is not currently available, the Research Technology & Communications team can help identify next steps and support reporting requests.

If you need a new report, updates to an existing report, or help with a specific reporting need, please submit a request here: Research Reporting | Office of Research.

For general myUABResearch questions or support, visit myUABResearch Contact | Office of Research.