Negotiation – Display Guide

Search/Display from Negotiation Module

How to Search and Display from the Negotiation Module

1. Open the Negotiations module by going to Maintain > Negotiations or clicking the Maintain Negotiations icon.

2. This will open the Negotiations module, and the search screen will automatically come up.

NOTE: If you accidently close the search screen you can always re-open a new search by going to Tools > Search or clicking the "Search for Negotiation" icon.

3. If you know the Negotiation number (e.g. the Institute Proposal Number), use that to search. Otherwise, search on the PI name, sponsor, project title, or any other available field.

4. The result of your search will create a list. Scroll through the list until you find the negotiation you want.

To open in Display: Double-click the row to open the Negotiation in Display -or- go to: Edit > Display Negotiation.

Search/Display from IP Module

Open Negotiation From IP Search Results

1. Open the Institute Proposal module by clicking Maintain>Proposals –or- clicking the icon. The Select Proposal screen will appear.

2. Complete a standard search for the targeted IP record.

3. Select the record result and then go to: Edit Negotiation –or- click on the Negotiation icon.

4. If a corresponding Negotiation record exists it will directly open in Display, closing will return User back to previous Institute Proposal Search Results.

Open Negotiation From Open IP Record

1. Selected Institute Proposal record must be open in either edit or display.

2. Go to Details > Negotiation

3. If a corresponding Negotiation record exists it will directly open in Display, closing will return User back to previous Institute Proposal record.

Medusa: Linking Records Across Modules

The Coeus application provides the function called Medusa that allows a User to see the connection points between the various Proposal modules and their records. Once a Proposal Development record has completed the Routing & Approval process, a corresponding Institute Proposal record is created. In the event that a proposal is revised and Resubmitted to the sponsor, a new Proposal Development record is generated that will then connect to the original IP.

To Access Medusa

1. Start by opening either the Proposal Development, Institute Proposal, or Negotiation modules.

2. Complete a search for the desired record.

3. Select the desired record from the Search Results List.

4. With your record highlighted, go to Edit > Medusa -or- click the "Medusa" icon.

Medusa Window

1. Proposal Records: The Institute Proposal,all corresponding Proposal Development Records, and the Negotiation Record if applicable are listed in this section. If there has been a Resubmission of the proposal, there will be multiple Development records listed.

2. Proposal Summary: Summary information about the selected Proposal Development or Institute Proposal record

3. Investigators: List of the PI and All Co-Is named on the proposal

4. Units: All departments listed on the proposal

Navigating to Records from Medusa

It is possible to open any of the listed Proposal Development, Institute Proposal, or Negotiation records from the Medusa screen.

To open a listed Proposal in Display:

1. Select the desired proposal from the list on the left of the screen.

2. Go to View > Display -or- click the "Open selected item in display mode" icon

To open a Negotiation Record in Display:

1. Click on the listed Institute Proposal Record to select it

2. Go to View > Negotiation -or- click on the "Open Negotiation window for selected institute proposal" icon

 **To open the Notepad for a Listed Proposal:**

1. Select the desired proposal from the list on the left of the screen.

2. Go to View > Notepad -or- click the "Open Notepad for selected item" icon

NOTE: If there is no Negotiation record created yet for the selected Institute Proposal the system will inform you of that.

Negotiation Record Attributes

The upper section of the record holds data fields that define various attributes of the record. Many of these fields default from values found in either a Proposal Log or Institute Proposal record.
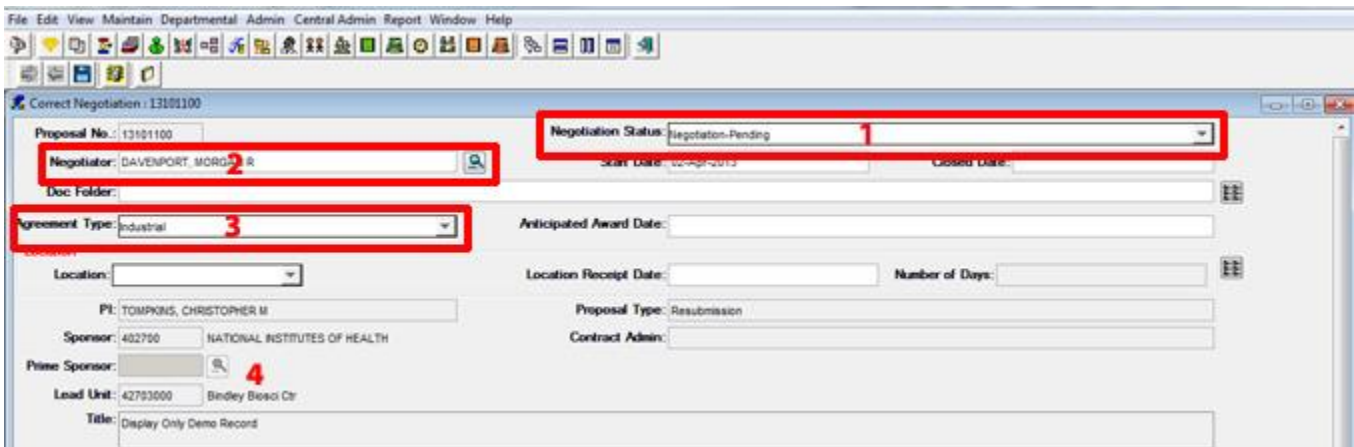
1. **Negotiation Status**: The status field designates the disposition of the Negotiation during its lifecycle.

- *Not Funded*: Selected when the corresponding proposal has been Not Funded by sponsor
- *Fully Executed*: Indicates that the agreement for this Negotiation has been signed by both parties and is available for Award
- *Void*: Voids Negotiation record when created in error
- *Negotiation-Pending*: Designates current processing through SPS Contracting
- *Prior Approval-Pending*: Designates current processing through SPS Post-Award

2. **Negotiator**: The person assigned as the Negotiator is responsible for the processing of this record. This could either be the SPS Contract Analyst or the SPS Post-Award Manager

3. **Agreement Type**: Designated the applicable agreement category.

4. **Proposal Information**: The fields in this section display identifying information for this Negotiation or represent the corresponding IP record when applicable.

- *PI*: Investigator responsible for this Negotiation
- *Sponsor*: External entity this Negotiation corresponds
- *Prime Sponsor*: Prime Sponsor if applicable
- *Lead Unit*: Purdue department responsible for this Negotiation
- *Title*: Title of Negotiation

Negotiation Record Activities & Attachments

The Negotiation Activities record individual steps during the processing of a contract or Prior Approval in a chronological order. Each activity depicts a specific interaction with a sponsor, communication, internal routing to a new location or a evolution in the life cycle of a record.

All listed Activities will be displayed in chronological order based on "Activity Date" and will show the most recent at the top of screen.

Activity Type	Activity Types are selected from a drop down box. This field is used to indicate the type of action that the current entry describes. For available types, see: Activity Types
Activity Date	This date is editable in the event that activity is entered after the fact. This should be the date that the activity took place.
Create Date	This date is system generated as to the date that the activity was first entered.

Followup Date	This date is editable. It is intended for a tickler/reminder to follow up on a significant action. In the future, SPS will be able to run a report with any activities marked with a followup date.
Last Update	This date is system generated as to the date that the activity was last edited.
Last Update By	System Generated with user name of the last editor of specific activity.
Description	A free text comment box with 2000 character maximum length. Only the first 180 characters will appear on reports. The entire comment will remain viewable in Coeus. Note that the system requires something be typed in this box.
Attachments	Some comments may have related documents uploaded as an electronic attachment. This will be indicated by an icon to the right of the "Create Date" field. Click the icon to open and view the attached document in a separate browser window.

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Printing Negotiation Activities

The entered Negotiation record Activities can be extracted as a system generated report in .pdf format and contain either a single identified Activity or all available Activities.

Print Individual Activities: Click on the specific listed Activity that you wish to print and then click the "Print" button on the right side of the screen. This will generate a .pdf output form containing the selected Activity in separate browser that you may print to hardcopy or save to desktop as an electronic file.

Print All Activities: Click the "Print All" button on the right side of the screen. This will generate a .pdf output form containing all displayed Activities in separate browser that you may print to hardcopy or save to desktop as an electronic file.

Negotiation Activity Report

Proposal No:	13101100	**Investigator:** TOMPKINS, CHRISTOPHER M
Sponsor:	402700 : NATIONAL INSTITUTES OF HEALTH	
Title:	Display Only Demo Record	
Lead Unit:	42703000 : Bindley Biosci Ctr	
Proposal Type:	Resubmission	**Start Date:** 04/02/2013
Doc File Address:		
Contract Admin:		**Status:** Negotiation-Pending
Negotiator:	DAVENPORT, MORGAN R	

Activity Date:	03/28/2013	**Create Date:** 04/02/2013	**Followup Date:**
Activity Type:	Fully Executed		
Last Update:	04/25/2013	**Updated By:** TOMPKINS, CHRISTOPHER M	
Description:			

Information regarding this specific activity or event will be entered by the appropriate SPS Contract Analyst, SPS Post-Award Administrator, or Regulatory Administrator.