

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 accidentally 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.



Proposal No.	Type	Activity	Status	Lead Unit	Lead Unit Name	Account No.	Title
13101128	Resubmission	Organized Research	Awarded	42703000	Bindley Biosci Ctr		Demo Rec

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

File View Maintain Departmental Admin Central Admin Report Window Help

Medusa - Award, Institute Proposal and Development Proposal Links

View

- Proposal -> Award
- Award -> Proposal

1

11121170

00001011

00001012

00001013

2

Proposal No: 11121170 Status: Pending

Title: Coeus Display Only Guide

Proposal Type: Resubmission

Account: Sponsor Ppal No:

NSF Code: Activity Type: Organized Research

Sponsor: 403243 ROLLS-ROYCE, INC Notice Of Opp: RFP

Prime Sponsor: 402725 NATIONAL SCIENCE FOUNDATION

	Initial Period	Total Period
Requested Start Date:	01-Jan-2012	01-Jan-2012
Requested End Date:	31-Dec-2012	31-Dec-2013
Total Direct Cost:	\$518,790.76	\$1,040,202.95
Total Indirect Cost:	\$258,547.01	\$518,509.60
Total All Cost:	\$777,337.77	\$1,558,712.55

Cost Sharing

IDC Rates

Special Review

3

Investigators

TOMPKINS, CHRISTOPHER M

DAVENPORT, MORGAN R

HAMAKER, AMANDA K

4

Units

41406000 : Elec & Computer Engr

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:

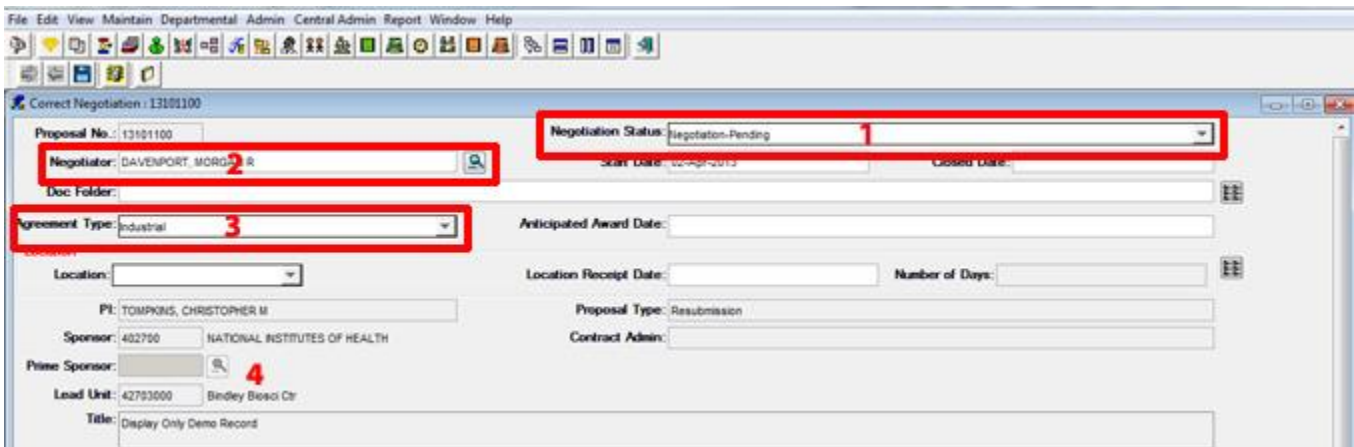


1. Select the desired proposal from the list on the left of the screen.
2. Go to View > Notepad -or- click the "Open Notepad for selected item" icon

 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.

 Activity Type: Fully Executed	Activity Date: 03/28/2013	Create Date: 04/02/2013	
Followup Date:	Last Update: 04/02/2013	Last Update By: TOMPKINS, CHRISTOPHER M	
Description:		OSP only: <input type="checkbox"/>	
Information regarding this specific activity or event will be entered by the appropriate SPS Contract Analyst, SPS Post-Award Administrator, or Regulatory Administrator.			

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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Followup Date:	Last Update: 04/02/2013	Last Update By: TOMPKINS, CHRISTOPHER M	
Description:		OSP only: <input type="checkbox"/>	
<div style="border: 1px solid black; padding: 5px;"> <p>Information regarding this specific activity or event will be entered by the appropriate SPS Contract Analyst, SPS Post-Award Administrator, or Regulatory Administrator.</p> </div>			

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- 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. 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.
- Attachments**

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.


The screenshot displays the 'Display Negotiation: 13101100' window in the Coeus Beta application. The main form contains the following data:


- Proposal No.:** 13101100
- Negotiation Status:** Negotiation-Pending
- Negotiator:** DAVENPORT, MORGAN R
- Start Date:** 02-Apr-2013
- Closed Date:** (empty)
- Doc Folder:** (empty)
- Agreement Type:** Industrial
- Anticipated Award Date:** (empty)
- Location:** (empty)
- Location Receipt Date:** (empty)
- Number of Days:** (empty)
- PI:** TOMPKINS, CHRISTOPHER M
- Proposal Type:** Resubmission
- Sponsor:** 452700 NATIONAL INSTITUTES OF HEALTH
- Contract Admin:** (empty)
- Prime Sponsor:** (empty)
- Lead Unit:** 42703000 Binsley Biosci Ctr
- Title:** Display Only Demo Record

At the bottom of the window, there is a table of activities:

Activity Type	Activity Date	Create Date	Last Update	Last Update By	OSP only
Activity Type: Fully Executed	Activity Date: 03/28/2013	Create Date: 04/02/2013	Last Update: 04/25/2013	Last Update By: TOMPKINS, CHRISTOPHER M	<input type="checkbox"/>
Description: Information regarding this specific activity or event will be entered by the appropriate SPS Contract Analyst, SPS Post-Award Administrator, or Regulatory Administrator.					
Activity Type: To Contract Analyst	Activity Date: 03/01/2013	Create Date: 04/02/2013			

On the right side of the window, there are buttons for 'New', 'Modify', 'Print', and 'Print All'. The 'Print' and 'Print All' buttons are highlighted with a red box.

 **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:			
Negotiator:	DAVENPORT, MORGAN R	Status:	Negotiation-Pending

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.
