



2008 Coeus User Conference

Coeus Negotiations: A Functional Pre-Award Perspective

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Presentation Outline

- # Negotiation Module Overview
- # Negotiation Creation
- # Using the Temporary Log
- # Completing a Negotiation Record
- # Printing out of the Negotiation Module
- # Helpful Hints

Negotiation Module Overview

- # Purpose of the Negotiation Module
- # Negotiation Record Overview
- # Application of the Negotiation Module
- # Relationship of Negotiations to other modules
- # Searching in Negotiations

Purpose of the Negotiation Module

- # General Negotiation tracking related to a proposal
- # General miscellaneous Negotiation Tracking
- # Other document tracking.

Negotiation Record Overview

Coeus - wamozart

File Edit View Maintain Departmental Admin Central Admin Window Help

Negotiation : 08090183

Proposal No.: 08090183 Negotiation Status: Negotiation-Pending

Negotiator: Mozart, Wolfgang, A Start Date: 19-Mar-2008

Doc Folder: C:\Documents and Settings\tompkinc\My Documents

PI: Armstrong, Neil Proposal Type: New

Sponsor: 406372 National Science Foundation Contract Admin:

Lead Unit: 41903000 Aviation Technology

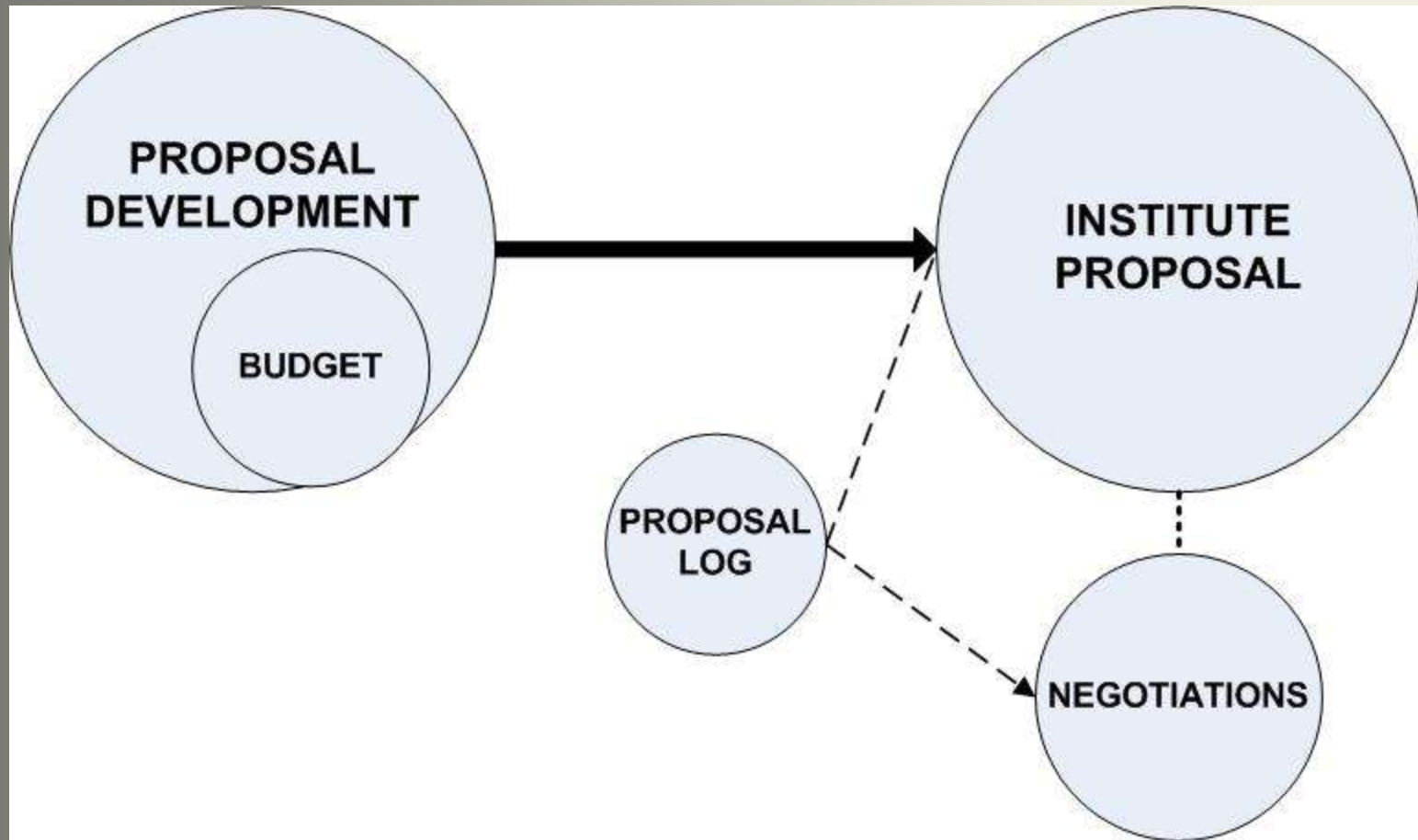
Title: Creating a Negotiation from an Institute Proposal Record

New
Modify
Print
Print All

Activity Type: Comment Activity Date: 01/15/2008 Create Date: 03/19/2008
Followup Date: 01/18/2008 Last Update: 03/19/2008 Last Update By: Mozart, Wolfgang, A
Description: Email to sponsor for clarification regarding Training Document. OSP only:

Activity Type: Return from Sponsor Activity Date: 01/11/2008 Create Date: 03/19/2008
Followup Date: 01/14/2008 Last Update: 03/19/2008 Last Update By: Mozart, Wolfgang, A
Description: Received signed Training Document from Sponsor. OSP only:

Relationship of Negotiations to Other Pre-Award Modules



Searching in Negotiation Module

- # Standard Coeus Search
- # Negotiation Record uses IP number if attached to Institute Proposal.
- # Negotiation Record uses unique IP number if “stand-alone”.
- # Temporary Negotiations utilize “T-Number”

Standard Negotiation Creation

- ✦ Creation from an existing Institute Proposal Record
- ✦ Creation from the Proposal Log - “Stand Alone” records

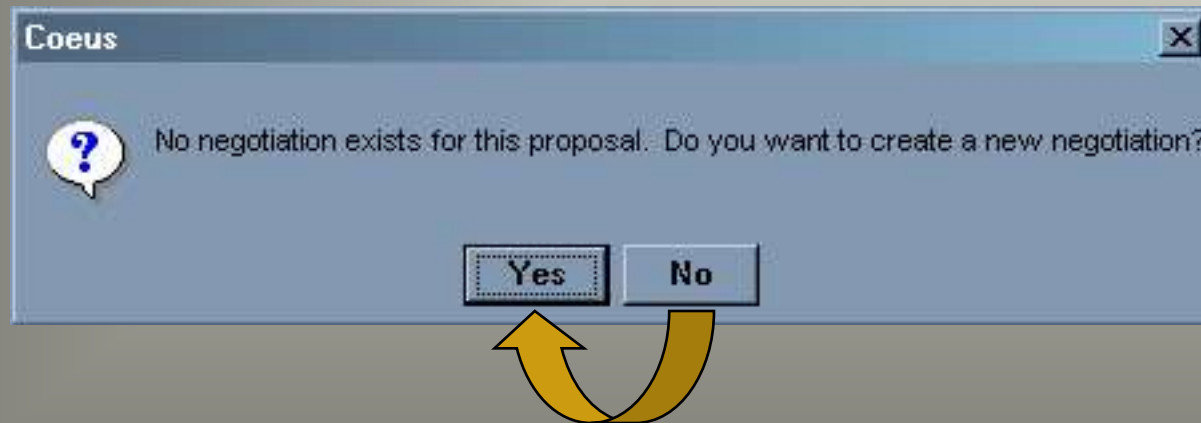
Generate from Institute Proposal(1)

- ✦ IP Module: Search for IP record to attach
- ✦ Highlight result and go to: Edit > Negotiation, -or-, click Negotiation Icon



Generate from Institute Proposal(2)

- ✦ If no Negotiation exists: Window will open asking to generate > Click “Yes”



Generate from Institute Proposal(3)

✦ New Negotiation will generate attached to selected IP record.

The screenshot shows the Coeus software interface with the following data:

Field	Value
Proposal No.:	08090183
Negotiation Status:	[Dropdown]
Negotiator:	[Text]
Start Date:	18-Mar-2008
Doc Folder:	[Text]
PI:	Armstrong, Neil
Proposal Type:	New
Sponsor:	406372 National Science Foundation
Contract Admin:	[Text]
Lead Unit:	41903000 Aviation Technology
Title:	Creating a Negotiation from an Institute Proposal Record

Buttons on the right: New, Modify, Print, Print All

Generate from Proposal Log(1)

- ✦ Complete standard Proposal Log Process to generate new IP number.

The screenshot shows a web form titled "Add Proposal Log" with the following fields and actions:

- Proposal Number:** 08090185
- Proposal Type:** New (dropdown menu)
- Title:** Creating a Stand Alone Negotiation Record from the Proposal Log
- PI Name:** Armstrong, Neil
- Lead Unit:** 41903000 (Aviation Technology)
- Sponsor:** 406372 (National Science Foundation)
- Comments:** (empty text area)

On the right side of the form, there are three buttons: "Close", "Log Proposal", and "Print".

Yellow arrows point to the following elements:

- The "New" dropdown menu in the Proposal Type field.
- The "Pending" dropdown menu.
- The "Print" button.
- The search icon next to the PI Name field.
- The search icon next to the Lead Unit field.
- The search icon next to the Sponsor field.

Generate from Proposal Log(2)

- ✦ Enter Negotiation Module and close Search Window.
- ✦ Go to Edit > Add Negotiation, -or- Click “Create a New Negotiation” Icon



Generate from Proposal Log(3)

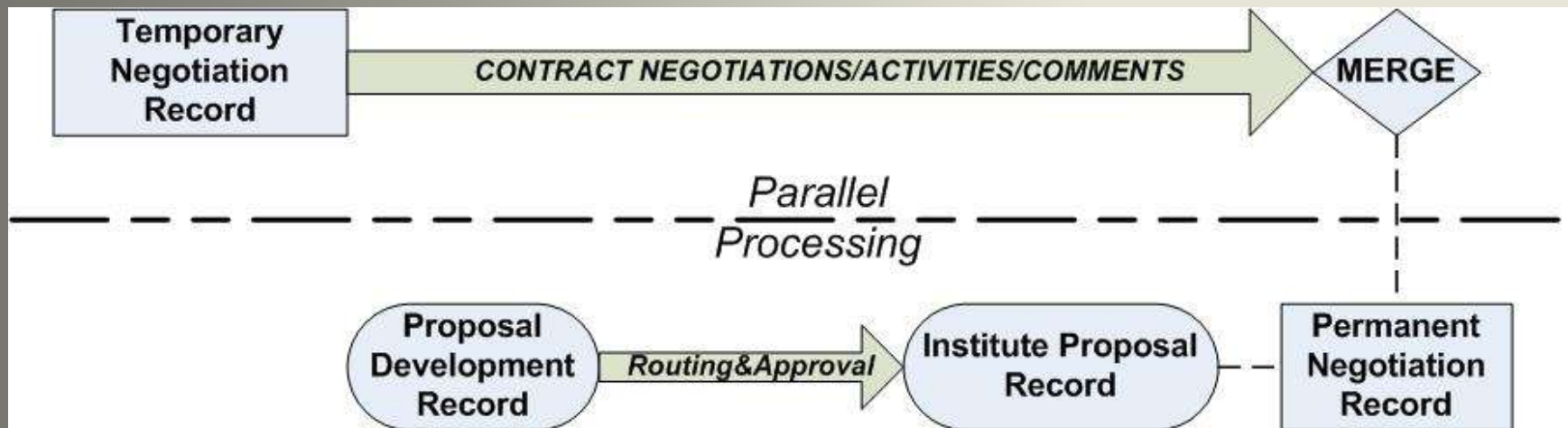
- ✦ Complete search for IP number generated from Log and click “OK”.
- ✦ Data entered into log will transfer to new Negotiation record.
- ✦ Complete remaining fields and Save.

The screenshot displays a software application window with a 'Negotiation' form and a 'Proposal Search' dialog box. The 'Proposal Search' dialog box is the primary focus, featuring a table with the following columns: Proposal Number, IP Name, Sponsor Code, Sponsor Name, Title, and P#. The table is currently empty. To the right of the table are buttons for 'Cancel', 'Find', and 'Close'. The background shows a 'Negotiation' form with fields for Proposal No., Regulation, Doc Folder, IP, Sponsor, Local Dist, Title, Negotiation Status, Start Date, Proposal Type, and Contact Address.

Temporary Negotiations

- ✦ *Purpose:* The Temporary Log and the resulting Temporary Negotiation records are used when the negotiation process commences prior to the generation of an Institute Proposal. The Temporary Negotiation record is later “merged” to the Institute Proposal record and receives the permanent IP number.

T-Number Situational Flow



Generation of a Temporary Negotiation(1)

- ✦ Same process as generating a permanent Negotiation from the Proposal Log
- ✦ EXCEPT: Enter the Temporary Log instead of creating a new Proposal Log



Generation of a Temporary Negotiation(2)

- ✦ Once Temporary Log entry is complete, a new “T” number will generate to be attached to a new Negotiation Record.

The screenshot shows a web form titled "Create Temporary Proposal Log". The form contains the following fields and controls:

- Proposal Number:** T0000056
- Proposal Type:** New (dropdown menu)
- Status:** Temporary (dropdown menu)
- Title:** 2008 Coeus User Conference - Coeus Neogtiations: A Functional Pre-Award Perspective
- PI Name:** Armstrong, Neil (with a search icon) **Employee:**
- Lead Unit:** 41903000 (with a search icon) Aviation Technology
- Sponsor:** 406372 (with a search icon) National Science Foundation
- Comments:** (empty text area)

On the right side of the form, there are three buttons: "Close", "Log Proposal", and "Print".

Merging a T-Record to an IP(1)

- ✦ Open the proposal log and search for the previously generated “T” number.
- ✦ Highlight correct record from results and click the “Merge” icon



The screenshot shows the Coeus software interface with a menu bar (File, Edit, Maintain, Departmental, Admin, Central Admin, Tools, Window, Help) and a toolbar containing various icons. The 'Proposal Log List' window is open, displaying a table with the following data:

Number	Unit	Proposal Type Code	Pi Name	Unit	Unit Name
T0000056	2008 Coeus User ...	New	Armstrong, Neil	41903000	Aviation Techn

A yellow arrow points from the 'Merge' icon in the toolbar to the first row of the table.

Merging a T-Record to a Permanent Log - Uses

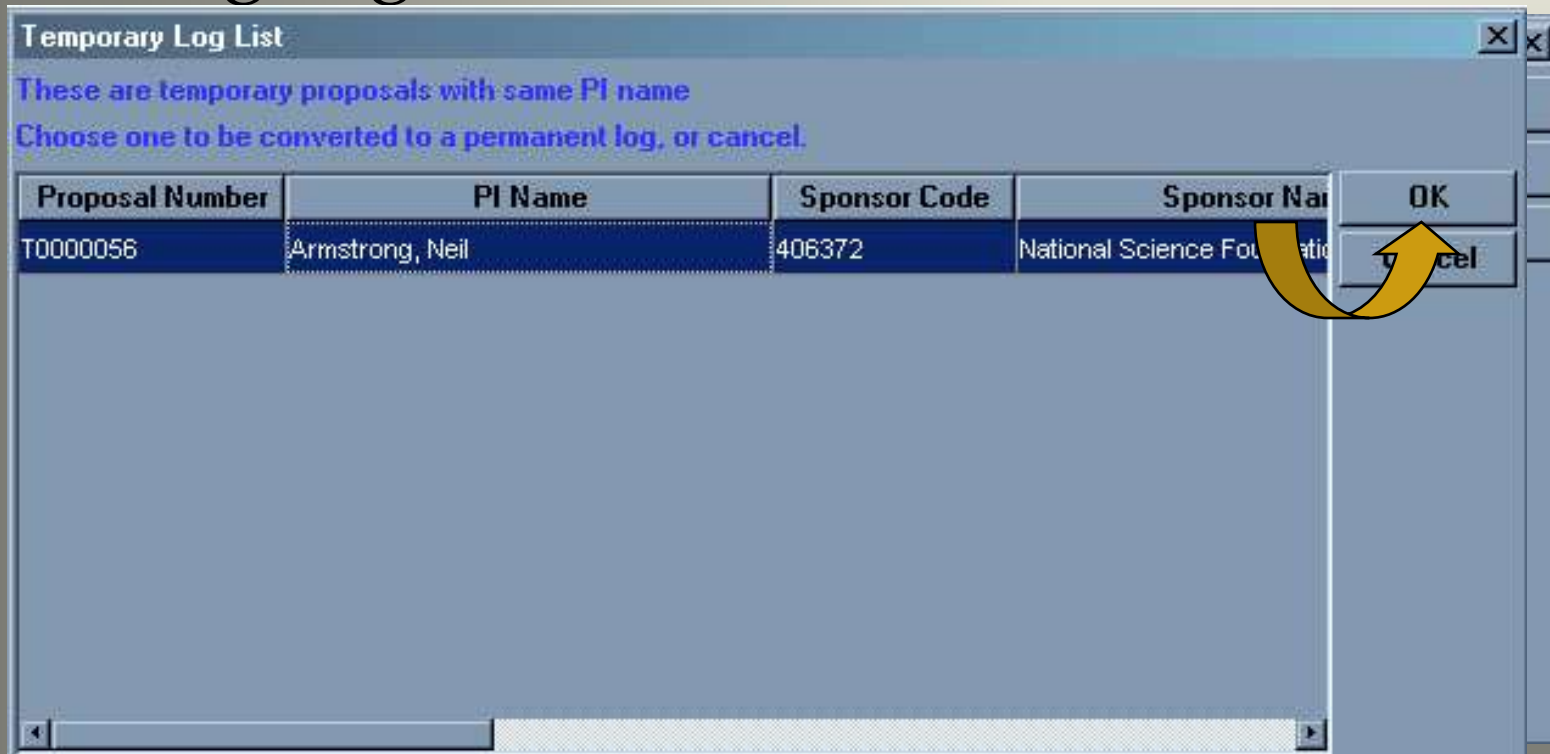
- ✦ If Proposal Development/Routing & Approval are not used, a T-Number may be merged at the Proposal Log stage.
- ✦ If the existing Temporary Record needs to become a stand alone Negotiation, a permanent number may be established and merged using the Proposal Log function.

Merging a T-Record to a Permanent Log(1)

- # Generate a new Proposal Log entry using standard process.
- # When the “Log Proposal” button is clicked, IF a T-Record exists, a window will open providing the opportunity to Merge at that time.
- # ***CAUTION*** This opportunity will become available for all Temporary Records for the specified PI for any Proposal Log generation.

Merging a T-Record to a Permanent Log(2)

- ✦ To Merge T-Records to a Proposal Log, highlight the correct result and click Ok.



“T” Number Caution

WARNING WARNING WARNING

- ✦ Once a Temporary Record has been Merged it CANNOT be un-merged.
- ✦ Please always ensure that the permanent IP number is correct prior to Merging.

Completing a Negotiation Record

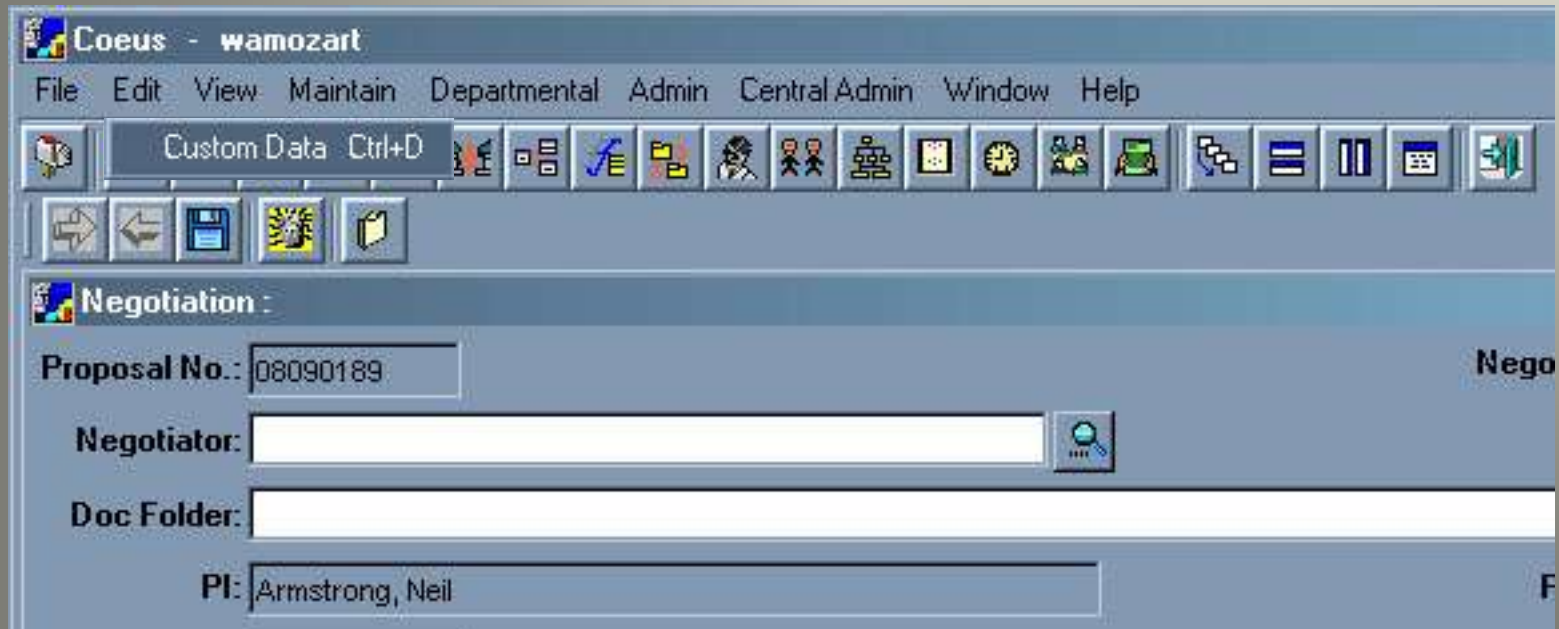
- ✦ Complete Required Fields in Negotiation Attributes

The screenshot shows a web browser window titled "Coeus - wamozart" with a menu bar (File, Edit, View, Maintain, Departmental, Admin, Central Admin, Window, Help) and a toolbar. The main content area is a "Negotiation" form with the following fields:

Proposal No.:	08090189	Negotiation Status:	[Dropdown]
Negotiator:	[Text]	Start Date:	26-Mar-2008
Doc Folder:	[Text]		
PI:	Armstrong, Neil	Proposal Type:	New
Sponsor:	406372 National Science Foundation	Contract Admin:	[Text]
Lead Unit:	41903000 Aviation Technology		
Title:	Temporary Merge to Proposal Log		

Negotiation Custom Data

- ✦ Custom Data fields may be added through Admin > Custom Elements
- ✦ Go to Edit > Custom Data



The screenshot shows the Coeus software interface with the following details:

- Window Title:** Coeus - wamozart
- Menu Bar:** File Edit View Maintain Departmental Admin CentralAdmin Window Help
- Toolbar:** Includes a 'Custom Data Ctrl+D' button and various icons for navigation and editing.
- Form Fields:**
 - Proposal No.:** 08090189
 - Negotiator:** (Empty text field with a search icon)
 - Doc Folder:** (Empty text field)
 - PI:** Armstrong, Neil

Negotiation Custom Data - Examples

The screenshot shows a software window titled "Coeus" with a close button (X) in the top right corner. The window contains a form with the following fields:

Account Manager	<input type="text"/>	
Agreement Type	<input type="text"/>	
HIPAA	No	
Due Date (mm/dd/yyyy)	<input type="text"/>	
Standard Template	<input type="text"/>	

On the right side of the window, there are two buttons: "OK" and "Cancel".

Negotiation Activities

- # Activity comments comprise the main body of the record.
- # May be used for tracking, general information, recording correspondence, etc.

The screenshot shows a web browser window displaying a negotiation record. The interface includes a menu bar (File, Edit, View, Mailing, Departmental, Admin, Central Admin, Window, Help) and a toolbar with various icons. The main content area is titled "Negotiation: 00001003" and contains the following fields:

- Proposal No.: 00001003
- Negotiator: Mozart, Wolfgang, A
- Doc Folder: C:\Documents and Settings\tonspink\My Documents
- PI: Armstrong, Neil
- Sponsor: A08372 National Science Foundation
- Lead Unit: 01903000 Auction Technology
- Title: Creating a Negotiation from an Institute Proposal Record
- Negotiation Status: Negotiation-Pen
- Start Date: 13-MAR-2008
- Proposal Type: New
- Contract Admin: [Empty]

Below the form fields, there are three activity entries, each with a "Description" field and a "DSP only" checkbox:

- Activity Type:** Comment
Activity Date: 01/15/2008
Followup Date: 01/14/2008
Last Update: 03/19/2008
Create Date: 03/19/2008
Last Update By: Mozart, Wolfgang, A
Description: Email to sponsor for clarification regarding Training Document
- Activity Type:** Return from Sponsor
Activity Date: 01/11/2008
Followup Date: 01/14/2008
Last Update: 03/19/2008
Create Date: 03/19/2008
Last Update By: Mozart, Wolfgang, A
Description: Received signed Training Document from Sponsor
- Activity Type:** To Sponsor
Activity Date: 01/01/2008
Followup Date: 01/14/2008
Last Update: 03/19/2008
Create Date: 03/19/2008
Last Update By: Mozart, Wolfgang, A
Description: Training Document Sent to Sponsor

On the right side of the interface, there are buttons for "New", "Modify", "Print", and "Print All".

Adding Negotiation Activities

- ✦ Click the “New” button to generate a new activity.
- ✦ Complete all required/optional fields.

The screenshot shows a 'Negotiation Activity' dialog box with the following fields and controls:

- Activity Type:** A dropdown menu with a yellow arrow pointing to it.
- Activity Date:** A date input field with a yellow arrow pointing to it.
- OSP Only:** A checked checkbox with a yellow arrow pointing to it.
- Create Date:** A date input field containing '03/26/2008'.
- Followup Date:** A date input field with a yellow arrow pointing to it.
- Last Update:** A date input field.
- Last Update By:** A text input field.
- Description:** A large text area with a yellow arrow pointing to it.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right.

Negotiation Activity Hints

- # Activity date is manually entered.
- # “OSP Only” Box
- # Description is required for ALL activity entries.
- # Activity Entries may be modified after saving. (Double click Activity or highlight and click “Modify”)

Printing Negotiations

- ✦ Negotiation Attributes and Individual Activities: Select desired Activity and click “Print”
- ✦ Negotiation Attributes and All Activities: Click “Print All”
- ✦ PDF output format

The screenshot shows a Microsoft Internet Explorer browser window displaying a web page titled "Negotiation Activity Report". The browser's address bar shows the URL: <https://abtran.kap.purdue.edu/coeus/Reports/NegotiationActivity00090183493262088-0156214.pdf>. The page content includes the following information:

Negotiation Activity Report

Proposal No: 08260185 Investigator: Armstrong, Neil
Sponsor: 405372 : National Science Foundation
Title: Creating a Negotiation from an Institute Proposal Record
Lead Unit: 41903000 : Aviation Technology
Proposal Type: New Start Date: 03/19/2008
Doc File Address: C:\Documents and Settings\lompkinc\My Documents Contract Admin: Status: Negotiation-Pending
Negotiator: Mozart, Wolfgang, A

Activity Date: 01/15/2008 Create Date: 03/19/2008 Followup Date: 01/15/2008
Activity Type: Comment
Last Update: 03/19/2008 Updated By: Mozart, Wolfgang, A
Description:
Email to sponsor for clarification regarding Training Document.

Activity Date: 01/11/2008 Create Date: 03/19/2008 Followup Date: 01/14/2008
Activity Type: Return from Sponsor
Last Update: 03/19/2008 Updated By: Mozart, Wolfgang, A
Description:
Received signed Training Document from Sponsor.

Activity Date: 01/01/2008 Create Date: 03/19/2008 Followup Date: 01/12/2008
Activity Type: To Sponsor
Last Update: 03/19/2008 Updated By: Mozart, Wolfgang, A
Description:
Training Document Sent to Sponsor.

Tips:

- # Follow Up Date field on activities and daily reports.
- # Potential for any document tracking.
- # Information resource for Business Users and Faculty.

Additional Questions

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