

Version 4.4.3

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## Negotiations Guide



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## I. Negotiations Overview









The Negotiation Module allows the Contract Administrators and Private Funding Administrators in the Office of Sponsored Projects to track negotiations associated with proposals. This module provides the functionality to keep notes on the status of a negotiation, to track the progress of the negotiation, and to generate status reports on negotiations.

## II. Navigation and Toolbars

**Coeus Main Toolbar**



**Negotiations Toolbar**

Icon	Action	Icon	Action
	Create New Negotiation		Print out Negotiation
	Correct Negotiation		Sort the Negotiation entries in the displayed list
	Display Existing Negotiation in view-only mode		Search for Negotiation
	Medusa; Displays relationships between Awards, Proposals, and Subcontracts		Close the Negotiation window

### III. Negotiation Field Definitions

#### ■ **Negotiation Window**

The Negotiations window is divided into two sections; the top portion contains Negotiation attributes and the bottom portion contains detailed Negotiation activity.

Negotiation window – fields

#### ■ **Negotiation Attributes**

- **Proposal No.** – The unique identifying number of a proposal; *assigned by Coeus*.
- **Negotiation Status** (Required Field) – The current status of the negotiation. Status options are as follows: *Pending Action from Brown University, Pending Action by Negotiator, Complete, In Process, and Suspended*.
- **Negotiator** (Required Field) – The Brown Contract Administrator or Brown Private Funding Administrator who is handling the negotiation.
- **Start Date** – The date the negotiation is created in Coeus; *assigned by Coeus*.
- **Closed Date** – The date the negotiation was closed in COEUS

- **Doc Folder** – Location of referenced files related to the negotiation.
- **Agreement Type**- Type of Agreement that is being negotiated, Type options are as follows: *Standard Research Agreement (SRA), Non-Disclosure Agreement (NDA), Material Transfer Agreement (MTA), No Cost Collaboration (NCC), Data Use Agreement*
- **Anticipated Award Date**: Estimated Date of Award
- **Location**: Types are as follows: *OSP, TVO, OGC, Sponsor, DLC*
- **Location Receipt Date**: Date the Negotiation was received by the selected office
- **Number of Days**: Coeus generated number of dates in between the Start and end of the Negotiation
- **PI** – The lead Principle Investigator on the proposal the negotiation is linked to.
- **Proposal Type** – Nature of the proposal being submitted: *New, Resubmission, Renewal, Continuation, Revision*. The following are the **Proposal Type Definitions**:

**New** – An application that is being submitted to an agency for the first time.

**Resubmission** – An application that has been previously submitted, but was not funded, and is resubmitted for new consideration.

**Renewal** – An application requesting additional funding for a period subsequent to that provided by a current award. A renewal application competes with all other applications and must be developed as fully as though the applicant is applying for the first time.

**Continuation** – A non-competing application for an additional funding/budget period within a previously approved project period.

**Revision** – An application that proposes a change in – 1) the Federal Government's financial obligations or contingent liability from an existing obligation; or 2) any other change in the terms and conditions of the existing award. (*Previously Supplement*).

**Task Order** - A contract for services that does not procure or specify a firm quantity of services (other than a minimum or maximum quantity) and that provides for the issuance of orders for the performance of tasks during the period of the contract.

- **Sponsor** - The external funding agency to where a proposal was submitted. Sponsors include private businesses, corporations, foundations and other not-for-profit organizations, other universities, and federal, state and local governments.
- **Prime Sponsor**: Prime Sponsor if listed on the original Proposal
- **Contract Admin** – **Currently Not Used**.
- **Lead Unit** – The department specified on the proposal that has submitted the proposal and is responsible for the sponsored project if proposal is funded.
- **Title** – The title of the proposed project.

## ■ **Negotiation Activity Window**


The screenshot shows a web-based form titled "Negotiation Activity Window". The form has a light beige background and a blue border. On the right side, there are four buttons: "New", "Modify", "Print", and "Print All". The main form area contains the following fields:

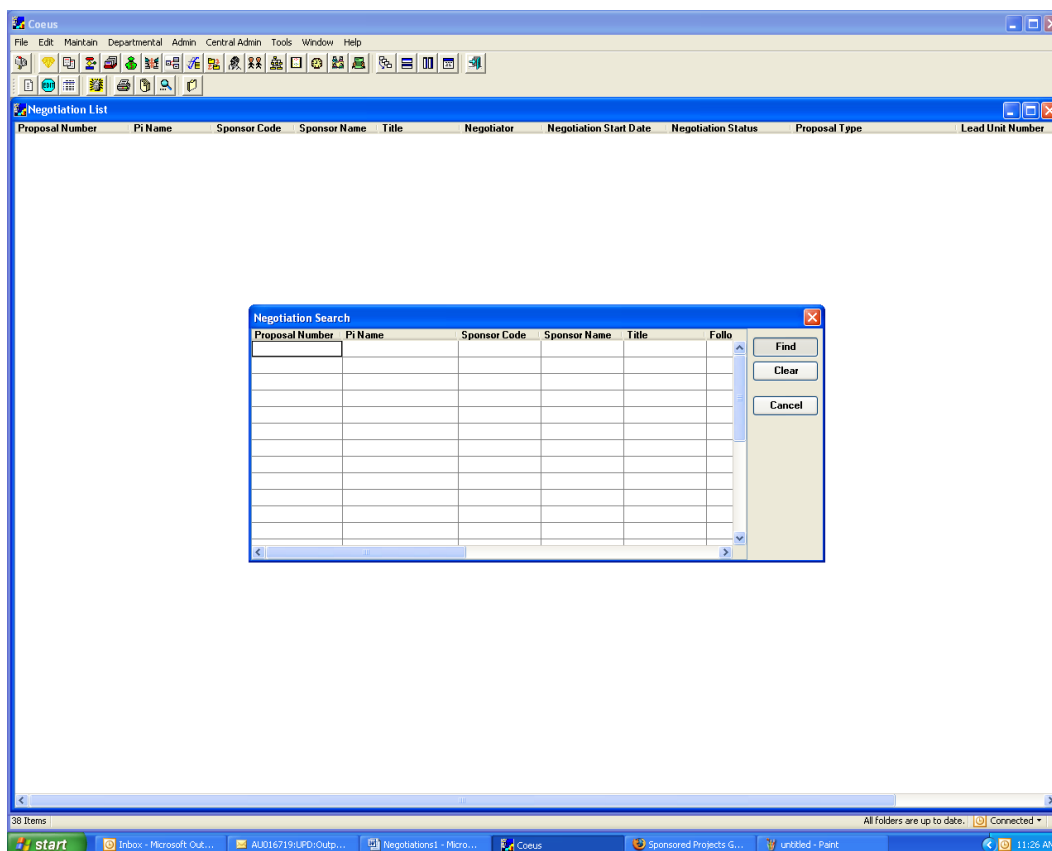
- Activity Type:** Conference Call
- Activity Date:** 11/02/2010
- Create Date:** 11/02/2010
- Followup Date:**
- Last Update:** 11/02/2010
- Last Update By:** Hull, Shelly L.
- Description:** testing
- OSP only:** ☐

Negotiation Activity window - fields



- **Activity Type** (Required Field) – The nature of negotiation activity that occurred: *Conference Call, Reviewed Documents, Email, Fax Received, Fax Sent, Meeting, Telephone Call, Other, Draft Document, Revised Document, Correspondence Sent, Correspondence Received, Courier Package Sent, Courier Package Received, Executable Document Sent, Executable Document Received, and Filed.*
- **Activity Date** (Required Field) – The date the negotiation activity occurred.
- **OSP Only** – Only the OSP office can review the record (if there is a check in the box).
- **Create Date** – The date the negotiation record is created in Coeus. *Generated by Coeus when the record is saved.*
- **Follow-up Date** – The date to follow-up on the negotiation activity.
- **Last Update** – The date the negotiation was last updated. *Generated by Coeus when the record is saved.*
- **Last Update By** – The Coeus user who last updated the record. *Generated by Coeus when the record is saved.*
- **Attachment:** Upload Attachments to activity if desired; marked by an icon in the corner of the window
- **Description** - Details of the negotiation activity that occurred.

## IV. Creating a New Negotiation

1. To open the Negotiation module click on the **Maintain Negotiations**  icon or select **Maintain > Negotiations** from the menu bar to open the Negotiation List window with the Negotiation Search window displayed on top.



*Initial Negotiation List window with Negotiation Search window*

2. Close the Negotiation Search window by clicking the  of the Search window or clicking the **[Cancel]** button.
3. To create a new Negotiation click on the **Create a New Negotiation**  icon or select **Edit > Add Negotiation** from the Menu bar to open the Negotiation window with the Proposal Search window displayed on top.

*Negotiation Window with Proposal Search window*

© Negotiations are attached to existing proposals, therefore you must select the Institute proposal that the negotiation is related to.

4. In the Proposal Search window enter any known proposal information in the appropriate field; *PI*, *Sponsor Name*, *Title*, etc. and click the **[Find]** button. The proposals that match the selection criteria appear in the Proposal Search Result tab.

*Proposal Search window*

The proposals that match the selection criteria appear in the **[Proposal Search Result]** tab.



5. Highlight the Proposal that you want to add a negotiation to and click the [OK] button.

Proposal Number	Pi Name	Sponsor Code	Sponsor Name	Title	Proposal
06080002	Schasel, Marisa J.	000021	AMERICAN ASSO...	prop maintainer role	New
06080001	Schasel, Marisa J.	000480	NATIONAL SCIEN...	test functional tes...	New
06090034	Schasel, Marisa J.	000703	U.S. DEPARTMEN...	test of ip tab	New
06100040	Schasel, Marisa J.	123456	The Providence F...	Coeus Training at ...	New

*Highlighted proposal*

The Negotiation window opens in Edit mode.

## ■ Completing the Negotiation Window

Correct Negotiation : 11041079

Proposal No.: 11041079      Negotiation Status: Pending Action by Brown

Negotiator: Derby, Emily A.      Start Date: 14-Oct-2010      Closed Date: 01-Dec-2010

Doc Folder:      Anticipated Award Date:      Location Receipt Date: 01-Dec-2010      Number of Days:      Proposal Type: New



Agreement Type: Data Use Agreement      Location: DSP      PI: Derby, Emily A.      Contract Admin:      Prime Sponsor:      Lead Unit: 030139 Research Protections Office      Title: Testing the new version

*Negotiation window*

6. Enter Negotiation details:

© The following fields are informational read-only and default from the proposal record, *Proposal No.*, *PI*, *Proposal Type*, *Sponsor*, *Prime Sponsor*, *Contract Admin* (Currently Not Used) *Lead Unit* and *Title*.

<b>Proposal Number</b>	Assigned by Coeus	The unique identifying number of a proposal. Proposal number defaults from the proposal selected; <i>a read-only field</i> .
<b>Negotiation Status</b> ↓	<b>Required Field</b>	The current status of the negotiation. Select one of the following negotiation statuses from the drop-down menu: <i>Pending Action from Brown University</i> , <i>Pending Action by Negotiator</i> , <i>Complete</i> , <i>In Process</i> , and <i>Suspended</i> .
<b>Negotiator</b>	<b>Required Field</b>	The Brown Contract Administrator or Brown Private Funding Administrator who is handling the

		negotiation. When you click on the <b>Search</b>  icon, the Person Search window will appear for you to find the negotiator's name.
<b>Start Date</b>	Assigned by Coeus	The date the negotiation is created in Coeus. Assigned by Coeus; a <i>read-only field</i> .
<b>Doc Folder</b> ↓	Not Required	Location of reference files related to the activities of the negotiation. Click on the  icon to search for a folder to identify.

© Cannot list actual documents, must be at a folder level.

**Will show document location mapped to drive.**

**Doc Folder:** C:\Documents and Settings\jquinn\Desktop\Coeus Manual

<b>Agreement Type</b>	Required Field	Select the type of Agreement being Negotiated
<b>Anticipated Award Date</b>	Required Field	Estimated Date Award will be funded
<b>Location</b>	Required Field	Location of Negotiation, who is responsible for the next decision on the negotiation.
<b>Location Receipt Date</b>	Required Field	Date Negotiation was received by Location
<b>Number of Days</b>	Assigned by Coeus	Number of days counted by Coeus from the state of the negotiation to the close.
<b>PI</b>	Assigned by Coeus	The Lead Principle Investigator specified on the proposal. PI will default from the Proposal selected; a read-only field.
<b>Proposal Type</b>	Assigned by Coeus	The type of proposal being submitted as specified on the proposal. Proposal Type defaults from the proposal selected; a read-only field.
<b>Contract Admin</b>	<b>Currently Not Used</b>	
<b>Sponsor</b>	Assigned by Coeus	The external funding agency, which the proposal was submitted. The Sponsor defaults from the proposal selected; a read-only field.
<b>Prime Sponsor</b>	Assigned by Coeus	Prime Sponsor selected on the proposal record. This field is a read-only field.
<b>Lead Unit</b>	Assigned by Coeus	The Lead Unit (Department) specified on the proposal that is responsible for the sponsored project if proposal is funded. The Lead Unit (Department) defaults from the proposal selected; a read-only field
<b>Title</b>	Assigned by Coeus	The Title of the proposed project as specified on the proposal. The title defaults from the proposal selected; a read-only field.

7. Click on the **Save**  icon to save the negotiation details. To enter specific Negotiation Activities, proceed to Entering a Negotiation Activity.

## ■ Entering a Negotiation Activity

8. Click on the **[New]** button to enter new negotiation details.

Correct Negotiation : 11041079

Proposal No.: 11041079      Negotiation Status: Pending Action by Brown

Negotiator: Derby, Emily A.      Start Date: 14-Oct-2010      Closed Date: 01-Dec-2010

Doc Folder:      Anticipated Award Date:      Location Receipt Date: 01-Dec-2010      Number of Days:      Location: OSP

Agreement Type: Data Use Agreement      PI: Derby, Emily A.      Proposal Type: New

Sponsor: 000471 NATIONAL INSTITUTE OF HEALTH      Contract Admin:      Prime Sponsor:      Lead Unit: 030139 Research Protections Office

Title: Testing the new version

Activity Type: Conference Call      Activity Date: 10/01/2010      Create Date: 10/14/2010

Followup Date:      Last Update: 10/14/2010      Last Update By: Derby, Emily A.

Description:      OSP only: ☒

Buttons: New, Modify, Print, Print All

New button on Negotiation window

9. The Negotiation Activity window opens, enter the following details:

Negotiation Activity

Activity Type:      Activity Date:      OSP Only ☒

Create Date: 11/19/2010      Followup Date:      OK

Last Update:      Last Update By:      Cancel

Attachment:      Browse      Remove      View

Description:

Negotiation Activity window

<b>Activity Type</b> ↓	<b>Required Field</b>	The type of negotiation activity that occurred. Select the appropriate negotiation activity type from the drop-down menu: <i>Conference Call, Telephone Call, Email, Fax Sent, Meeting</i> , etc.
<b>Activity Date</b>	<b>Required Field</b>	Date the negotiation activity occurred. Enter date as (mm/dd/yy).
<b>OSP Only</b> (Check box)	Not Required Field	Coeus automatically defaults the <i>OSP Only</i> with a check in the box <input checked="" type="checkbox"/> , meaning only the OSP office

		can view the record. If you want to allow others to view the negotiation activity, uncheck the box.
<b>Create Date</b>	Assigned by Coeus	Date the negotiation activity record is created. Coeus will generate the record creation date when you open the Negotiation Activity window; <i>a read-only field.</i>
<b>Follow-up Date</b>	<b>Required Field (OSP Procedure)</b>	Date to follow-up on the negotiation activity. Enter date as (mm/dd/yy). <b>Coeus currently does not automatically notify the user to follow-up.</b>
<b>Last Update</b>	Assigned by Coeus	Coeus will generate the last update date when the record is saved. <i>A read-only field.</i>
<b>Last Update By</b>	Assigned by Coeus	Coeus will generate the user's name in this field when the record is saved. <i>A read-only field.</i>
<b>Attachment</b>	<b>Not Required</b>	This attachment field allows a user to upload attachment to a specific activity. The attachments can be PDF, Word or Excel.
<b>Description</b>	<b>Required Field</b>	Detail of the Negotiation activity. Summarize the negotiation activity/issues in this field.

9. Click the [OK] button to save the changes.


The new Negotiation Activity entry is added to the Negotiation window.

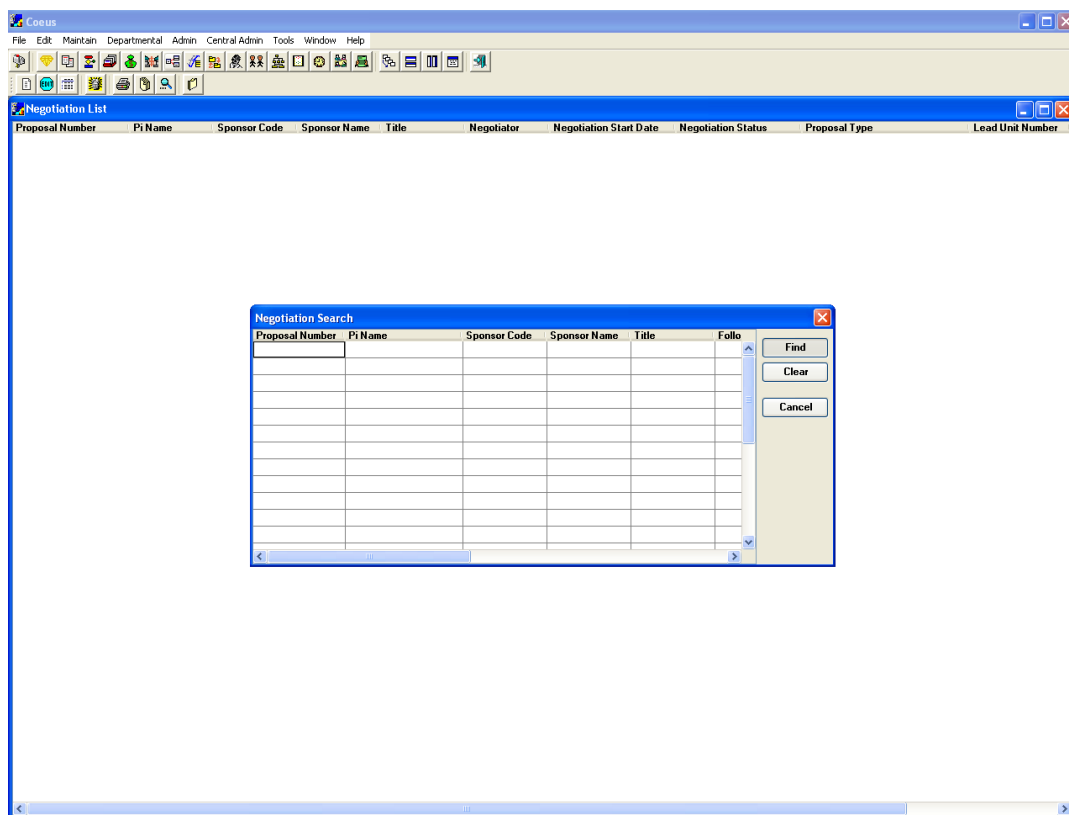
When documents are attached to the activity, a symbol will appear in the right corner of the listing.

The screenshot shows a software interface for managing negotiation activities. It features two main sections for activity listings. Each section includes fields for 'Activity Type', 'Activity Date', 'Create Date', 'Followup Date', 'Last Update', and 'Last Update By'. Below these fields is a 'Description' text area. The top entry has 'testing' in the description. The bottom entry has 'Testing' in the description. To the right of the bottom entry's listing, there is a small icon (a document with a red 'X') which, according to the text, indicates an attachment. On the far right, there are three buttons: 'Modify', 'Print', and 'Print All'.

Negotiation window with Negotiation Activity.

## V.Modifying an Existing Negotiation

1. To modify an existing negotiation click on the **Maintain Negotiations**  icon or select **Maintain > Negotiations** from the menu bar to display the Negotiation List window with the Negotiation Search window displayed on top of it.



Initial Negotiation List window with Negotiation Search window

2. In the Negotiation Search window, enter any known Negotiation information (ex. *PI Name*, *Proposal number*, *Negotiator*) in the appropriate field to find the negotiation.




Negotiation Search window

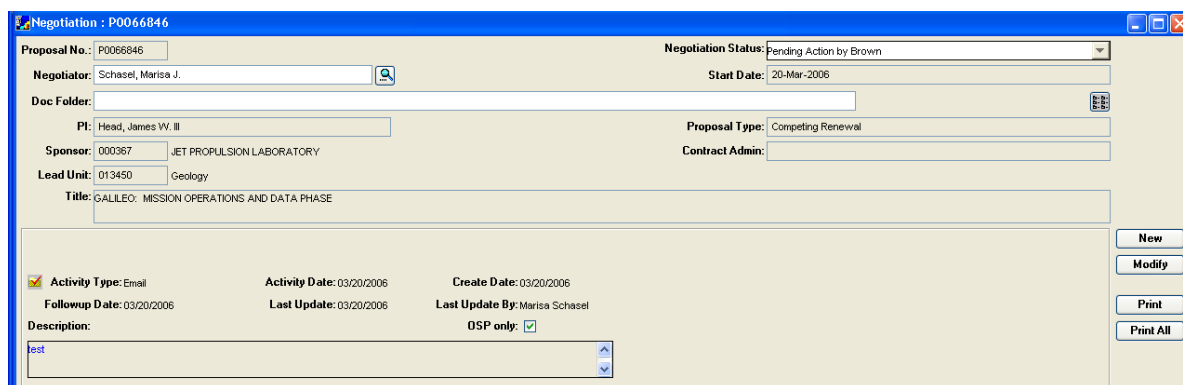
Search results will be returned to the Negotiation List window.



Proposal Number	Pi Name	Sponsor Code	Sponsor Name	Title	Negotiator	Negotiation Start Date	Negotiation Status	Proposal Type	Lead Unit Number
P0077228	Becker, Adeline	000028	AMERICAN EDUC...	AMERICAN EDUC...	Schasel, Marisa J.	28-Apr-2006	Pending Action by Brown	New	011615
P0080931	Xu, Jingming	000049	ANTEON CORPOR...	CARBON NANOT...	Schasel, Marisa J.	22-Feb-2006	Pending Action by Other Party	New	013350
P0085425	Nurmikko, Arto V.	000230	DEFENSE ADVAN...	OPTOELECTRONI...	Schasel, Marisa J.	20-Mar-2006	Pending Action by Brown	Supplement	013810
P0081751	Mustard, John F.	000315	HAMILTON SUNS...	HYPERSPECTRAL...	Schasel, Marisa J.	02-Mar-2006	In Process	New	013450
P0080438	Mustard, John F.	000367	JET PROPULSION ...	CRISM-OMEGA LI...	Schasel, Marisa J.	20-Mar-2006	Pending Action by Other Party	New	013450
P0084145	Head, James W. III	000455	NATIONAL AERO...	VALLEY NETWO...	Schasel, Marisa J.	29-Mar-2006	Pending Action by Brown	New	013450
P0084960	Prell, Warren L.	000766	UNIVERSITY OF R...	MODELING TOOL...	Schasel, Marisa J.	26-Jan-2006	Complete	New	013450

Negotiation List window with highlighted entry

3. Highlight the Negotiation and click on the  icon or select **Edit > Correct Negotiation** from the menu bar. Negotiation window opens.



**Negotiation : P0066846**

Proposal No.: P0066846      Negotiation Status: Pending Action by Brown

Negotiator: Schasel, Marisa J.      Start Date: 20-Mar-2006

Doc Folder:      Proposal Type: Competing Renewal

PI: Head, James W. III      Contract Admin:     

Sponsor: 000367 JET PROPULSION LABORATORY

Lead Unit: 013450 Geology

Title: GALILEO: MISSION OPERATIONS AND DATA PHASE

Activity Type: Email      Activity Date: 03/20/2006      Create Date: 03/20/2006

Followup Date: 03/20/2006      Last Update: 03/20/2006      Last Update By: Marisa Schasel

Description:      OSP only: ☒

test

New  
Modify  
Print  
Print All

Negotiation window

⇒ There are two options when modifying a negotiation:

1. Add a new negotiation activity to an existing negotiation.

- A new negotiation activity is created in order to separately track each action associated with a negotiation to maintain the history of all negotiation activities.

2. Modify or correct a previously entered negotiation activity.

- A negotiation activity is modified / edited when you need to correct data entry errors or when you need to expand upon the activity details / description.
- When an activity is edited you can override previously captured text within the activity window; i.e. history is not maintained.

## ■ Add a New Activity to the Existing Negotiation

Any Brown Contract Administrator or Private Foundation Administrator can enter a new negotiation activity to a selected negotiation. When a new activity takes place during the negotiation process you:

Search and select the Negotiation that needs a new activity and open in Edit mode.

1. Click on the **[New]** button to enter the new activity information.

© This does not override any previous activities and preserves the history of the negotiation process.

*New Negotiation Activity window*

2. Enter the *Activity Type*, *Activity Date*, *Follow-up Date*, *Attach a document (if desired)* and *Description*. (For more details about each field, refer to page 10.)

3. Click on the **[OK]** button to save the activity.

© The most recent activity entered will appear at the top of the list in the Negotiation window.

**Correct Negotiation : 10050524**

Proposal No.: 10050524      Negotiation Status: Complete

Negotiator: Carroll, Patrice A.      Start Date: 19-Nov-2009      Closed Date:

Doc Folder:

Agreement Type: No Cost Collaboration (NCC)      Anticipated Award Date:

**Location**

Location: OGC      Location Receipt Date: 19-Nov-2009      Number of Days: 365

PI: Allen, Susan Masterson      Proposal Type:

Sponsor: 000660      STATE OF RHODE ISLAND DEPARTMENT OF H...      Contract Admin:

Prime Sponsor: 001894      New England States Consortium Systems Organization

Lead Unit: 040568      Bio-Med Gerontology Health Care

Title: NESCSO

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**Activity Type:** Email      **Activity Date:** 11/19/2010      **Create Date:** 11/19/2010  
**Followup Date:** 12/01/2010      **Last Update:**      **Last Update By:**  
**Description:**      **OSP only:** ☒  
Testing

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**Activity Type:** Other      **Activity Date:** 03/01/2010      **Create Date:** 03/09/2010  
**Followup Date:** 03/02/2010      **Last Update:** 03/09/2010      **Last Update By:** Carroll, Patrice A.  
**Description:**      **OSP only:** ☒  
This reflects a reversal by OGC - a statemate was reached with RDH. No changes allowed on BAA. Ted VonG told OSP "we have no choice but to sign". Cleared w/ OVRP on 3/1/10 - signed and delivered to Gerontology that day. Submitted to State.

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**Activity Type:** Other      **Activity Date:** 02/02/2010      **Create Date:** 02/02/2010  
**Followup Date:** 02/08/2010      **Last Update:** 02/02/2010      **Last Update By:** Carroll, Patrice A.  
**Description:**      **OSP only:** ☒  
In Dec 2009 it was decided by Regina that Business Associate Agreements will be reviewed and negotiated by OGC. Ted Von Gerichten is the OGC lead person on this.

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**Activity Type:** Telephone Call      **Activity Date:** 11/19/2009      **Create Date:** 11/19/2009  
**Followup Date:** 11/30/2009      **Last Update:** 11/19/2009      **Last Update By:** Carroll, Patrice A.  
**Description:**      **OSP only:** ☒  
Biz Assoc Agrmnt - to OGC for rvw/ appr b/c of HIPAA requirements. Talked today to Ted VG he is contacting PI directly for specific program info. Ted wcb when we can sign. Advised him that PI has anm 11/23/09 mtg which requires this signed doc.

*Listing of negotiation activities*

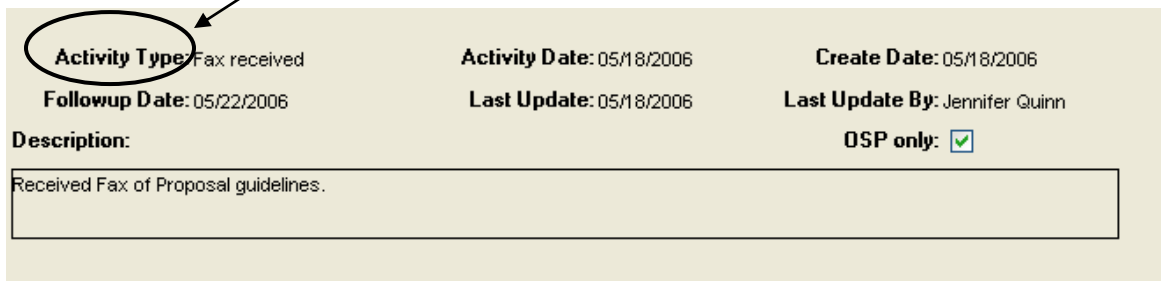


## ■ **Modify or Correct a Previously Entered Negotiation Activity**


To modify or correct a previously entered negotiation activity (ex: you need to add or change a description or you need to correct data entry errors) you must first select the Negotiation and open in Edit mode. Then select the activity you would like to modify.

© Only the Negotiator of that record can modify or correct a previously entered negotiation activity.

1. To select the activity, click next to the words, **Activity Type** of the negotiation activity you want to modify in the list.



**Activity Type:** Fax received      **Activity Date:** 05/18/2006      **Create Date:** 05/18/2006  
**Followup Date:** 05/22/2006      **Last Update:** 05/18/2006      **Last Update By:** Jennifer Quinn  
**Description:**      **OSP only:** ☒  
 Received Fax of Proposal guidelines.

A checked folder image  will appear on the left hand side of the words "Activity Type". This is the selected negotiation activity.



**Activity Type:** Telephone Call      **Activity Date:** 05/18/2006      **Create Date:** 05/18/2006  
**Followup Date:**      **Last Update:** 05/18/2006      **Last Update By:** Jennifer Quinn  
**Description:**      **OSP only:** ☒  
 Called PI.

 **Activity Type:** Fax received      **Activity Date:** 05/18/2006      **Create Date:** 05/18/2006  
**Followup Date:** 05/22/2006      **Last Update:** 05/18/2006      **Last Update By:** Jennifer Quinn  
**Description:**      **OSP only:** ☒  
 Received Fax of Proposal guidelines.

**Activity Type:** Email      **Activity Date:** 05/18/2006      **Create Date:** 05/18/2006  
**Followup Date:**      **Last Update:** 05/18/2006      **Last Update By:** Jennifer Quinn  
**Description:**      **OSP only:** ☒  
 Emailed contact

*Selected negotiation activity*

2. Click on the **[Modify]** button.

Correct Negotiation : 06100068

Proposal No.: 06100068 Negotiation Status: Complete

Negotiator: Ray, Roger Start Date: 25-Oct-2006 Closed Date:

Doc Folder: D:\Documents and Settings\Administrator\My Documents\Negotiation Related Documents

Agreement Type: Standard Research Agreement (SRA) Anticipated Award Date:

Location: Location Receipt Date: Number of Days:

PI: Mor, Vincent Proposal Type: New

Sponsor: 000196 COMMONWEALTH FUND Contract Admin:

Prime Sponsor: 000867 No Prime Sponsor

Lead Unit: 040568 Bio-Med Gerontology Health Care

Title: National Survey of Long-term Care Opinion Leaders

Activity Type: Other Activity Date: 10/31/2006 Create Date: 11/03/2006

Followup Date: Last Update: 11/03/2006 Last Update By: Ray, Roger

Description: OSP only: ☒

Received revised agreement from Commonwealth Foundation with all changes initialed by Andrea C. Landes. Grant set up completed.

Activity Type: Correspondence sent Activity Date: 10/18/2006 Create Date: 10/25/2006

Followup Date: Last Update: 10/25/2006 Last Update By: Ray, Roger

Description: OSP only: ☐

Sent letter to Nino DePaola after Norm initialed all changes and signed off on the document. We are awaiting its being initialed by Commonwealth and returned to us.

Activity Type: Email Activity Date: 10/18/2006 Create Date: 10/25/2006

Followup Date: Last Update: 10/25/2006 Last Update By: Ray, Roger

New Modify Print Print All

*Modify button in the Negotiation window*

3. The Negotiation Activity window opens and you can edit the selected negotiation activity.

Negotiation Activity

Activity Type: Fax sent Activity Date: 01/31/2011 OSP Only: ☒

Create Date: 01/31/2011 Followup Date: 02/28/2011

Last Update: 01/31/2011 Last Update By: Derby, Emily A.

Attachment: test Doc.docx Browse Remove View

Description: Testing

OK Cancel

*Modified negotiation activity*


4. Click on the **[OK]** button to save the changes.

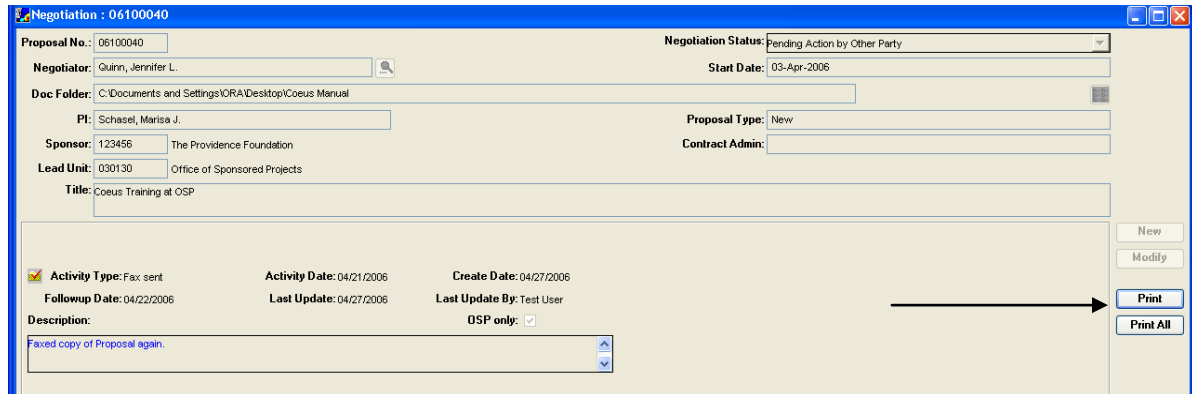
© When you modify a negotiation activity the previous state of the negotiation is overwritten. No history of previous state of activity is maintained. **Therefore, if history is to be maintained it is recommended that a new negotiation activity be created.**

## VI. Printing a Negotiation Activity Report

Within Coeus you can either print out a report of a selected negotiation activity or you can print out a report that details all the negotiation activities related to a specific proposal.

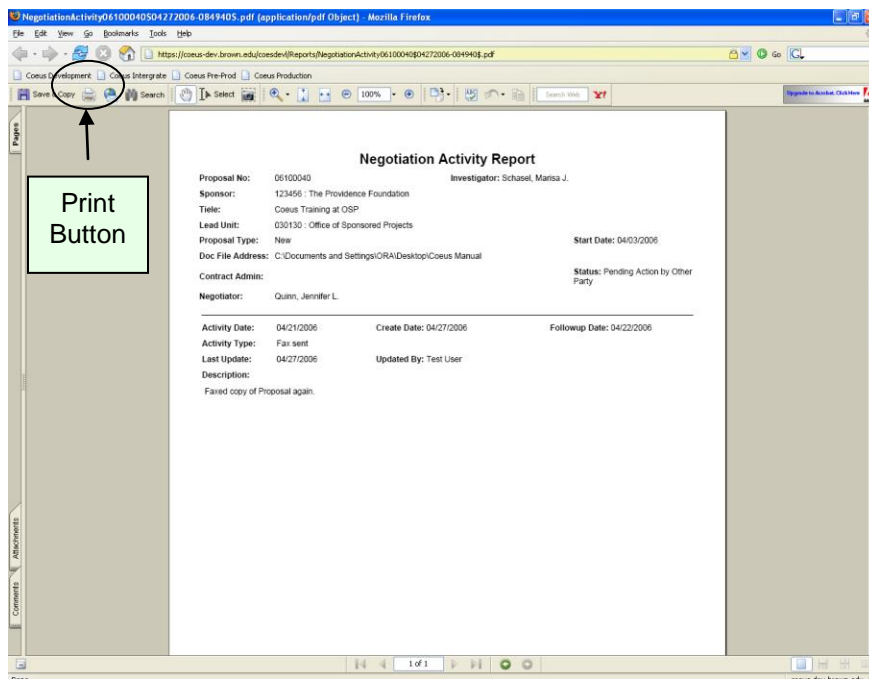
### ■ **Print a Report of One Selected Activity**

1. Select the activity, as indicated by the checked folder symbol .
2. Click the **[Print]** Button



*Selected Activity and **[Print]** button*

3. A PDF of the report will be created in Acrobat Reader and will open in a new window above the Coeus window.



*Negotiation Activity Report PDF*

4. Use the PDF Reader print option to print the report

## ■ **Print All Negotiation Activities For a Proposal**

1. Click the [**Print All**] Button

The screenshot shows a web application window titled "Negotiation : 06100040". It contains a form with the following fields:

- Proposal No.:** 06100040
- Negotiator:** Quinn, Jennifer L.
- Doc Folder:** C:\Documents and Settings\ORA\Desktop\Coeus Manual
- PI:** Schasel, Marisa J.
- Sponsor:** 123456 The Providence Foundation
- Lead Unit:** 030130 Office of Sponsored Projects
- Title:** Coeus Training at OSP
- Negotiation Status:** Pending Action by Other Party
- Start Date:** 03-Apr-2006
- Proposal Type:** New
- Contract Admin:**

Below the form, there is a section for activity details:

- Activity Type:** Fax sent
- Activity Date:** 04/21/2006
- Create Date:** 04/27/2006
- Followup Date:** 04/22/2006
- Last Update:** 04/27/2006
- Last Update By:** Test User
- Description:** ☒ OSP only: ☐   
 Faxed copy of Proposal again.

On the right side of the window, there are buttons: "New", "Modify", "Print", and "Print All". An arrow points from the "Print All" button to the right.

Negotiation activities and [**Print All**] button

2. A PDF of the report will be created in Acrobat Reader and will open in a new window above the Coeus window.

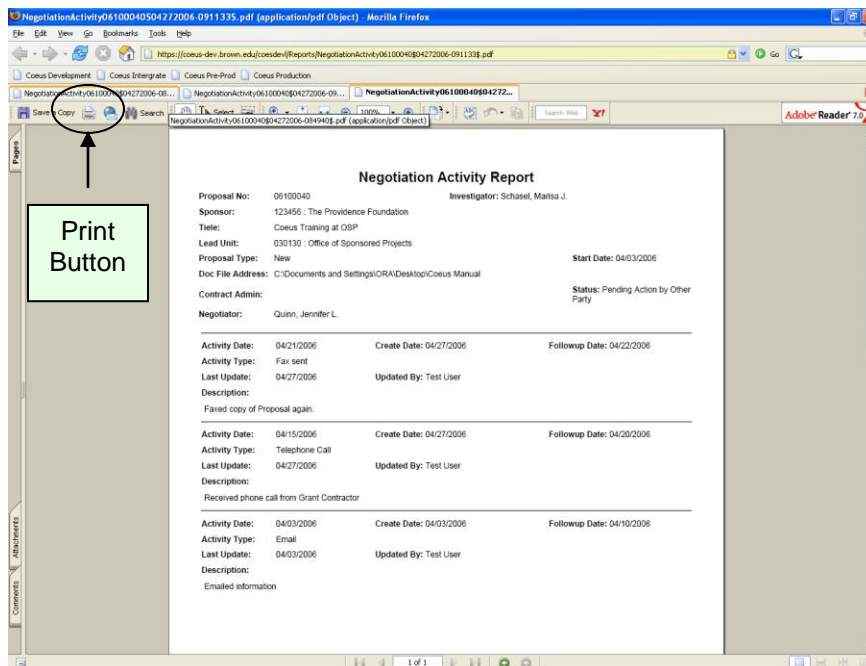


Figure 7.24: Negotiation Activity Report PDF

4. Use the PDF Reader print option to print the report


### ■ **Print All Negotiation for a Specific Negotiator (for OSP needs)**

1. Select "Negotiation" from the Maintain dropdown menu, a search window will open.
2. Search by Negotiation criteria, for generating a list of Negotiations for OSP purpose, Enter the Negotiator Name in the field and Click Find

Negotiation List								
Proposal Number	PI Name	Sponsor Code	Sponsor Name	Title	Negotiator	Negotiation Start Date	Negotiation Status	Proposal Type
P0086912	Sun, Shouheng	000902	NEI Corporation	NANOPARTICLE ...	Derby, Emily A.	2010/10/12	Pending Action by Brown	New
P0086786	Webster, Thomas	000645	SPIRE BIOMEDICAL	TESTING NOVEL ...	Derby, Emily A.	2010/11/02	Pending Action by Brown	New
P0086579	Mor, Vincent	000703	U.S. DEPARTMEN...	SHAPING LONG-T...	Derby, Emily A.	2010/11/02	Pending Action by Brown	New
P0086303	Mor, Vincent	000477	NATIONAL QUALI...	ACADEMIC PART...	Derby, Emily A.	2010/11/15	In Process	Continuation
P0081771	Morgan, Jeffrey R...	000703	U.S. DEPARTMEN...	KGF (FGF-7) LINK...	Derby, Emily A.	2010/08/31	In Process	New
11041079	Derby, Emily A.	000471	NATIONAL INSTIT...	Testing the new v...	Derby, Emily A.	2010/10/14	Pending Action by Brown	New

The results of this search should be all negotiations for a particular Negotiator,

To print the results:

3. Select either the Print icon from the tool bar  or select **[Print All]** from the File drop down menu



**Negotiation Report**

Proposal No: P0086912 Investigator: Sun, Shouheng

Sponsor: 000902 : NEI Corporation

Title: NANOPARTICLE - ENABLED CONSOLIDATED METAL NITRIDE EXCHANGED COUPLE MAGNETS

Lead Unit: 013210 : Chemistry

Proposal Type: New Start Date: 10/12/2010

Negotiator: Derby, Emily A. Status: Pending Action by Brown

Doc File Address: Contract Admin:

**Most Recent Activity**

Activity Date: 10/01/2010 Create Date: 10/12/2010 Followup Date:

Activity Type: Conference Call Last Update: 10/12/2010 Updated By: Derby, Emily A.

Description: Testing

Proposal No: P0086786 Investigator: Webster, Thomas

Sponsor: 000645 : SPIRE BIOMEDICAL

Title: TESTING NOVEL ORTHOREDDIC HELICAL COATINGS FOR ORTHOREDDIC APPLICATIONS

A PDF will open with all of the Negotiations listed, the select Print from the PDF window

## VII.Deleting Negotiations

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Negotiations cannot be deleted. If a negotiation needs to be deleted, contact the Coeus Support Specialist at [Coeus\\_Help@brown.edu](mailto:Coeus_Help@brown.edu).