

ROLODEX OVERVIEW

The Rolodex maintains contact information for Brown’s external contacts that are affiliated with Proposals, Awards, and Subawards.

For Proposal Development users, this would include an incoming investigator into Brown who has not been added to the HR System or key persons from other organizations named on the proposal.

The Rolodex entry includes information about the contact, such as the name of their organization, their address, their title, etc. The Rolodex does NOT store Agency Credentials or degree information.

ROLODEX MENU / ICON TOOLBARS

This menu / icon toolbar let you add, modify, delete, & copy rolodex entries.



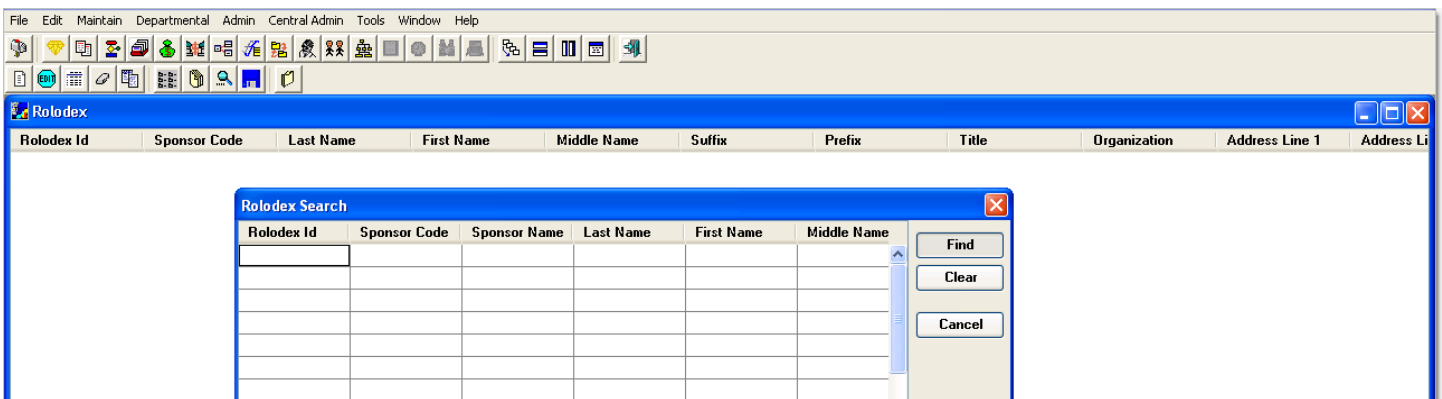
Menu Bar	Menu Item	Action	Icon
Edit	Add	Add a new Rolodex entry	
Edit	Modify	Edit a Rolodex entry <i>*(only entries you created)</i>	
Edit	Display	Display a Rolodex entry	
Edit	Delete	Delete a Rolodex entry <i>*(only if it is not affiliated with a record)</i>	
Edit	Copy	Copy a Rolodex entry	
No menu	No menu item	Search for Rolodex entries	

CREATE A NEW ROLODEX ENTRY

Navigate to the Rolodex module to search or create a rolodex entry;

Select **Maintain** → **Rolodex** from the menu bar -

The Rolodex Search Window opens above the Rolodex Window.




Before you add a name, be sure to search the Rolodex to determine if the name is already in it. This saves you time, and you avoid adding redundant information to the database.

To create a new entry click the [CANCEL] button or click the red [X] button in the top right hand corner of the Rolodex Search Window to close out.

You can add a new Rolodex entry in one of two ways:

- ❖ **You can add a new rolodex entry from scratch:** Enter all new information in the fields yourself. You will probably use this method to add entries for people in a new organization or location.
- ❖ **You can add a rolodex entry by copying an existing entry:** Find a similar entry, copy and modify the fields that are different. For example, if the new person works for the same organization as another individual already entered in the Rolodex, you can copy the existing entry and change the person’s name, title, and phone number.

➤ Add a New Rolodex Entry from Scratch

Select **Edit** → **Add** from the menu bar - 

- The Rolodex Id, Last Update and Update User fields will be populated by Coeus once you click the [OK] button / save the record.
- Enter the person’s details: (Use the <Tab> key to move from field to field.)



Do not use special characters (such as ü) in any Rolodex entry. Be careful about cutting and pasting into the Rolodex, since you might unintentionally include characters that cause Grants.gov to reject the entire proposal.

The following fields are required: Name (Last and First), Organization, Address (street address on the first line; other lines are optional), City, State, Postal Code, Country, Phone, and E-Mail.

→ Last Name – Enter the person’s last name.

- **First Name** – Enter the person’s first name.
- **Middle Name** – Enter middle name if applicable.
- **Suffix** – Enter suffix if included, Jr., Sr. PhD, etc.
- **Prefix** – Enter courtesy title, if desired; Mrs., Mr.
- **Title** – If the person has provided a title, such as Administrative Manager, it can be entered here. (Limit 25 characters).
- **Sponsor** – If you want to link the contact to an existing sponsor, click the [**SPONSOR**] button. The Sponsor Search window will come up and you can conduct a search for the desired sponsor. Once you find the sponsor and click the [**OK**] button, it will populate both the **Sponsor** and **Organization** fields. If you do not want to link to a Sponsor, press the <Tab> key to leave the **Sponsor** field blank.

- **Organization** - The organization field will be populated for you if you select a sponsor by clicking the [**SPONSOR**] button. If the individual is not affiliated with a sponsor, you can manually enter the name of the organization yourself with address information.
- **Address** – Enter up to three lines for the address of an organization. (At least one line is required)
- **City** – Enter the address of the city.
- **County** – Can Leave blank.
- **State** ↓ - Select the state from the drop-down menu or type the 2-character state code.
- **Postal Code** – Enter the 9 digit zip code (Do NOT include a dash between the first 5 digits and last 4 digits).
- **Country** ↓ – The field will default to the United States. Use the drop-down menu to select a country other than the U.S.
- **Phone** – Enter the telephone number, including the area code, in the following format nnn-xxx-nxxx (i.e., 609-258-6338) or enter the number without any dashes (i.e., 6092586338).
- **E Mail** - Enter email address.
- **Fax** – Enter the fax number, including the area code, in the format nnn-xxx-nxxx (i.e., 609-258-6338) or enter the number without any dashes (i.e., 6092586338).


→ **Comments** – Add an explanation or description (optional).

The 'Modify Rolodex' window contains the following fields and values:

- Rolodex Id:** 22464
- Last Update:** 15-Mar-2010 10:38:50 AM
- Updated By:** Quinn, Jennifer L.
- Name:** Last: O'Brien, First: Mary, Middle: (empty)
- Suffix:** (empty)
- Prefix:** (empty)
- Title:** Administrative Manager
- Sponsor:** (empty)
- Organization:** Miriam Hospital
- Address:** Lifespan Office of Research Administration, 593 Eddy Street - Aldrich 3
- City:** Providence
- County:** (empty)
- State:** RI : Rhode Island
- Postal Code:** 02903
- Country:** United States
- Phone:** 401-444-4487
- E Mail:** mobrien@lifespan.org
- Fax:** 401-444-4061

When the window is completed, click on the [OK] button to save the new rolodex entry.

If you have no further Rolodex entries to add, close the Rolodex window:

Select **File** → **Close** from the menu bar- 

➤ **Add a New Entry by Copying an Existing Entry**

If you are adding a new contact to a sponsor / organization that already has contacts set up, you can copy an existing entry, and simply change the parts that are different.

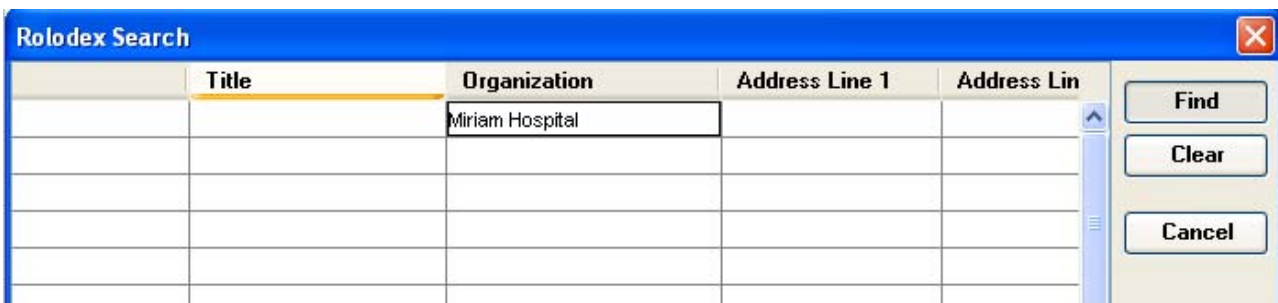
Navigate to the Rolodex module to search or create a rolodex entry;

Select **Maintain** → **Rolodex** from the menu bar - 

The Rolodex Search Window opens above the Rolodex Window.


The main Rolodex window displays a table with the following columns: Rolodex Id, Sponsor Code, Last Name, First Name, Middle Name, Suffix, Prefix, Title, Organization, Address Line 1, and Address Li. The Rolodex Search window is overlaid on top, containing a table with columns: Rolodex Id, Sponsor Code, Sponsor Name, Last Name, First Name, and Middle Name. The search window also includes 'Find', 'Clear', and 'Cancel' buttons.

Locate an entry that is like the new entry you need to create. For example, if you are adding a new Organization contact, you might locate another contact from the same organization by entering the org name in the Organization field of the Rolodex Search Window.



From the Rolodex list resulting from your search, select the entry most like the new entry.

Rolodex Id	Sponsor Code	Last Name	First Name	Middle Name	Suffix	Prefix	Title	Organization	Address Line 1	Address Li
21749	000442							MIRIAM HOSPITAL		
22400		Byron	Elyan				Manager	Miriam Hospital		
22401		Strenger	Rochelle					Miriam Hospital		
22406		Just	Diana					Miriam Hospital		
22407		Niaura	Raymond		PhD			Miriam Hospital		
22464		O'Brien	Mary				Administrative Manager	Miriam Hospital	Lifespan Office of Re...	593 Eddy Stre
22465		Abrams	David		PhD			Miriam Hospital		
22556		Carvalho	Rachel				Research Administrator	Miriam Hospital		

Select **Edit** → **Copy a Rolodex Entry** from the menu bar -  to open a copy of an existing entry in the Copy Rolodex Window.

Modify the fields in the Copy Rolodex Window for the new contact, i.e. **name, title, phone, email, etc.**

When the values are correct, save the new entry by clicking **[OK]**.


Select **File** → **Close** from the menu bar - 

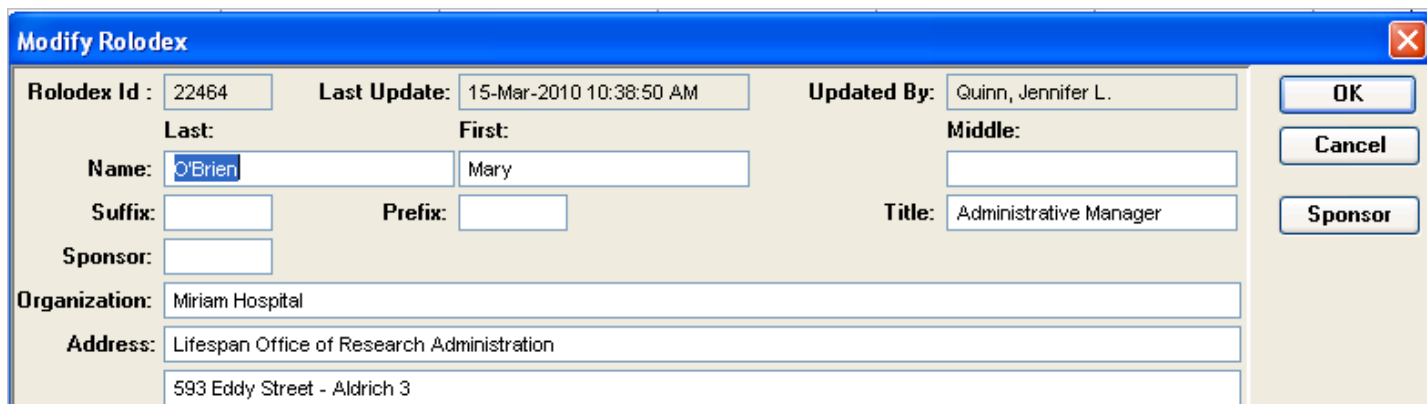
○ MODIFYING ROLODEX ENTRIES



You will only be able to modify Rolodex entries you created. If a contact has a misspelling or known address change and you cannot modify the entry, please contact Coeus_Help@brown.edu to have the record updated.

TO MODIFY AN ENTRY YOU CREATED:


- Conduct a search for the contact you wish to modify
- Select the line that contains the entry you want to change
- Select **Edit** → **Modify** from the menu bar-  to open the Modify Rolodex Window.



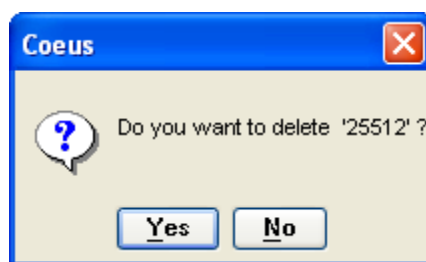
○ DELETING A ROLODEX ENTRY



You can only delete Rolodex entries that are not linked to a proposal, award, or subaward.

- Conduct a search for the contact you wish to delete
- Select the line that contains the entry you want to delete
- Select **Edit** → **Delete** from the menu bar- 

1. You will be prompted to verify that you really want to delete this entry.



2. Click on the [**Yes**] button to delete the entry. The entry will be deleted, and you will be returned to the Rolodex Window. (If you have changed your mind, click on the [**No**] button and you will be returned to the Rolodex Window without deleting the entry.)

*If it is a record that is affiliated with a proposal, award, or subaward, you will receive a message indicating which modules the Rolodex entry is connected with:

