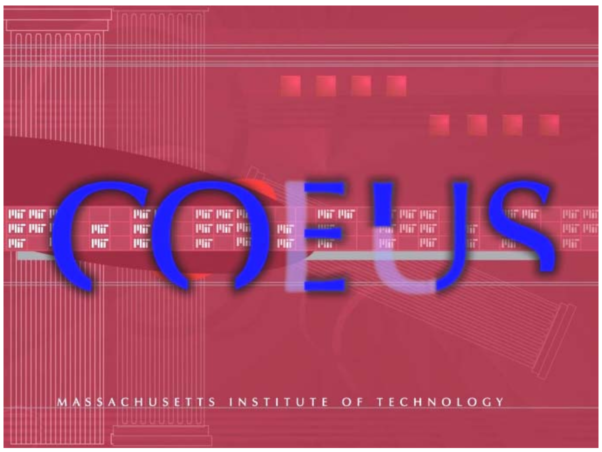

Coeus®

Version 4.3

Negotiation Module

Instructions and User Guide

May 2009

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Overview of Negotiation Module

The Negotiation Module tracks negotiations managed by the Office of Sponsored Programs (OSP), including but not limited to:

- sponsored research agreements
- no-cost collaboration agreements
- pre-proposal teaming agreements and letters/memoranda of intent
- pre-research non-disclosure agreements
- data-exchange non-disclosure agreements for use during sponsored research
- equipment use agreements for use during sponsored research
- research subcontracts.

This module provides the functionality to identify MIT's negotiator responsible for a negotiation, to keep notes on the status of a negotiation, to track the progress of the negotiation, and to generate status reports on negotiations.

Instructions for Negotiation Module

To enter a negotiation, you must first enter the proposal log number associated with the negotiation into the Proposal Log or create a Temporary Proposal Log Number.

> Note: If there is already a proposal in progress or if the Contract Administrator has already logged the Proposal, please use that number when creating your negotiation.

Entering a Proposal into the Proposal Log/Creating a Temporary Log

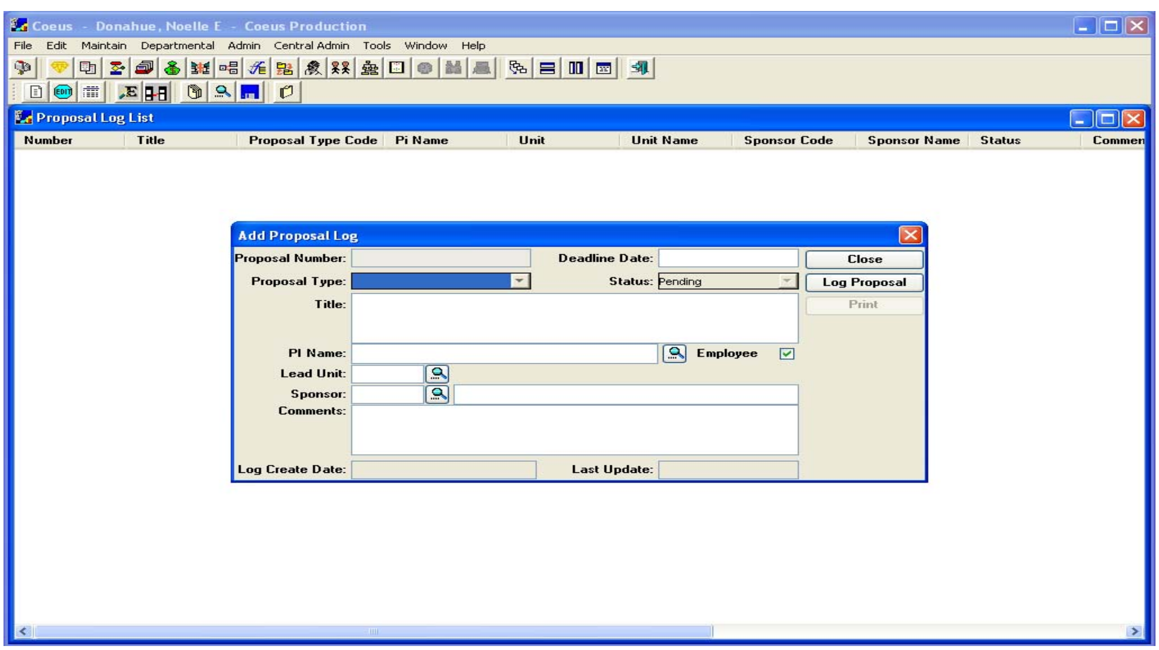
Access Proposal Log

1. Open Coeus
2. Go to **Maintain > Proposal Log**

Create a New Proposal Log

1. Click on the Create a New Proposal Log button  or select **Edit > New Log**

   The Add Proposal Log Screen appears:



2. Enter the Proposal Details

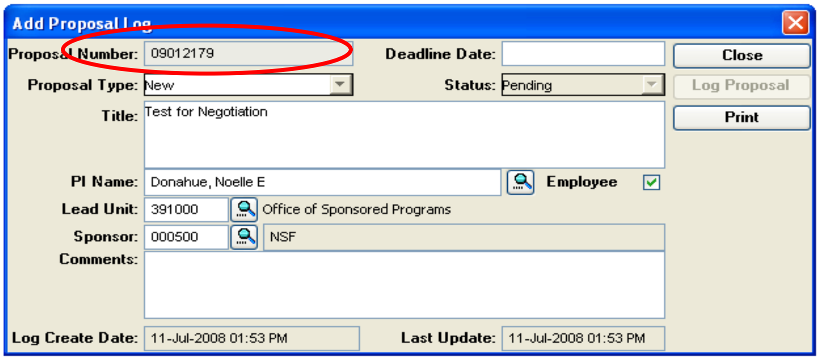
   Deadline Date – The date the proposal is due to the sponsor

   Proposal Type –(Required Field) ***-*** Nature of the proposal being submitted: *New*, *Resubmission*, *Renewal*, *Continuation*, *Revision*, *and Task Order*

Proposal Type	Description
Continuation	Non-competing continuation of an existing award
New	New application
Renewal	Competing continuation of an existing award
Resubmission	Amended or updated application
Revision	Supplement or revised proposal for an existing award
Task Order	Project funded under a master agreement

- ***Title –*** (Required Field) - The title of the proposed project of Agreement
- ***PI Name –*** (Required Field) ***-*** The Principal Investigator on the Proposal
- ***Lead Unit –*** (Required Field) – The department specified on the proposal that has submitted the proposal and is responsible for the sponsored project if proposal is funded.
- ***Sponsor –*** (Required Field) - The external funding agency to whom proposal was submitted. Sponsors include private businesses, corporations, foundations and other not-for-profit organizations, other universities, and federal, state and local governments.

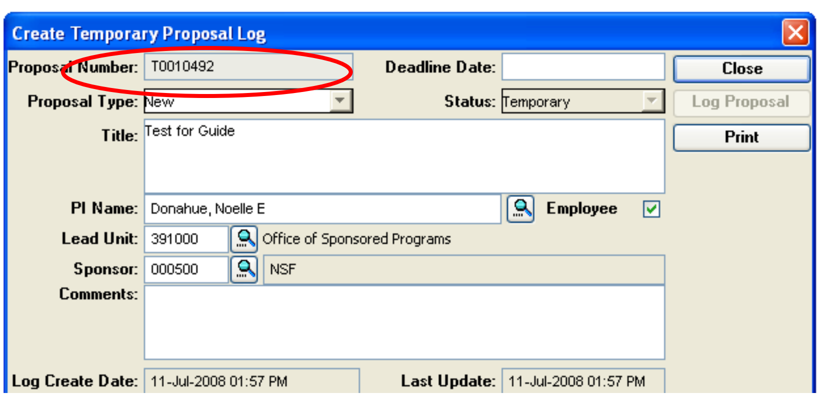
3. Click Log Proposal. A proposal number will be generated. Make note of this number or select print as this will become your negotiation number as well.



Create a Temporary Proposal Log

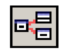
Note: You will need to enter a Temporary Log if there is no proposal yet or if it will never be awarded (i.e. for an NDA – Non-Disclosure Agreement). Once there is a proposal, the Institute Proposal and the Temporary Log can be merged.

1. To enter a temporary log, select **Edit > Temp Log**
2. Enter Proposals as in Step 2 above.
3. Click Log Proposal. A temporary proposal number will be generated that begins with "T." Make note of this number or select print as this will become your negotiation number.



Entering a New Negotiation

To enter a new negotiation, make sure you have your Proposal Log number or your Temporary Proposal number as you will be asked to enter this information.

1. Click on the Maintain Negotiations button  or go to **Maintain > Negotiations**

2. Close the Negotiation Search Screen by clicking the **Cancel** button.

3. Click on the Create a New Negotiation button  or select **Edit > Add Negotiation**

4. In the Proposal Search Screen, enter your proposal id number (or temporary proposal log number). Click Find. When your results screen appears, Click OK.

   Note: The information entered into the Proposal Log will automatically populate in the lower half of your screen

5. The Negotiations window is divided into two sections; the top portion contains Negotiation attributes and the bottom portion contains the detailed Negotiation activity. Enter your negotiation details on the top portion:

   - ***Proposal No.*** (Read-Only Field)– The unique identifying number of a proposal; this is the number that you assigned in the Proposal Log or the Institute Proposal Number and cannot be edited in the Negotiation Module. (populated automatically by COEUS)

   - ***Negotiation Status*** (Required Field) – The current status of the negotiation. Status options are as follows:
     - *Complete*
     - *In Process*
     - *On Hold*
     - *Terminated*
     - *Waiting for Executables*

   - ***Negotiator*** (Required Field) – The Administrator who is handling the negotiation. Click the Search Button  and enter the Negotiator's Last Name. Click **Find**. On the Results Screen, select your Negotiator by clicking on the row and the Click **OK** button.

- ***Start Date*** – The date the negotiation is created in Coeus; *assigned by Coeus*.

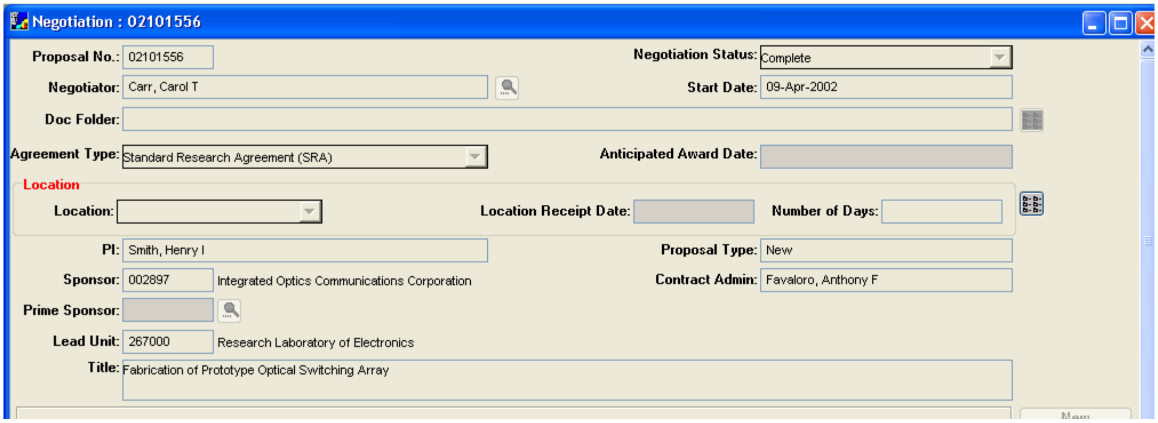
- ***Doc Folder*** (Not Required Field) **-** Not currently being use at MIT.
- ***Agreement Type*** (Required Field)**–** The type of Agreement that is being negotiated. Options are as follows:
  - *Standard Research Agreement*
  - *Non-Disclosure Agreement*
  - *Material Transfer Agreement*
  - *No Cost Collaboration*
  - *Master Research Agreement*
  - *Alliance Agreement*
  - *Consortium Agreement*
  - *Letter of Intent*
  - *Memorandum of Understanding*
  - *Teaming Agreement*
  - *Subcontract*
  - *Non-MIT Facilities Use Agreement*
  - *Equipment Use Agreement*

- ***Proposed Start Date*** – This is the anticipated date that the research/work begins. (MM/DD/YYYY format)
- ***Location*** – The Office responsible for taking the next action in the negotiation process. (Not currently used in OSP)
  - ***OSP***
  - ***TLO***
  - ***OGC***
  - ***Sponsor***
  - ***DLC***
- ***Effective Date -*** The date the negotiation begins. (Not currently used in OSP)

The Following Fields are populated by the linked Proposal Log and cannot be edited in the Negotiation Module:

- ***PI*** (Read-Only Field) – The lead Principal Investigator on the proposal the negotiation is linked to. This cannot be edited in the Negotiation Module.
- ***Proposal Type*** (Read-Only Field) **-** The type of proposal being submitted as specified on the proposal.
- ***Sponsor*** (Read-Only Field) **-** The external funding agency to which the proposal was submitted.
- ***Contract Admin*** (Read-Only Field) **-** Administrator responsible for contract

- ***Lead Unit*** (Read-Only Field)- The Lead Unit (Department) specified on the proposal that is responsible for the sponsored project if proposal is funded.
- ***Title*** (Read-Only Field) - The Title of the proposed project as specified on the proposal.



6. To enter your Negotiation Activity Notes, Click the New button on the right hand side of your screen.

7. Enter your Negotiation Activity notes.

   - ***Activity Type –*** This is the description of the type of activity being noted.

     - ***Conference Call***
     - ***Copied Documents***
     - ***Email***
     - ***Faxed 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***
     - ***Filed – Returned to CA***
     - ***Agreements/Documents Signed/Executed***

   - ***Activity Date –*** This is the date of when your negotiation activity that is noted in the description occurred. (MM/DD/YYYY Format)

- ***OSP Only –*** Only the Office of Sponsored Programs can review the record if the box is checked. In addition, if the OSP Only check box is checked, the negotiation activity will not be printed on the *Negotiation Activity Report*.

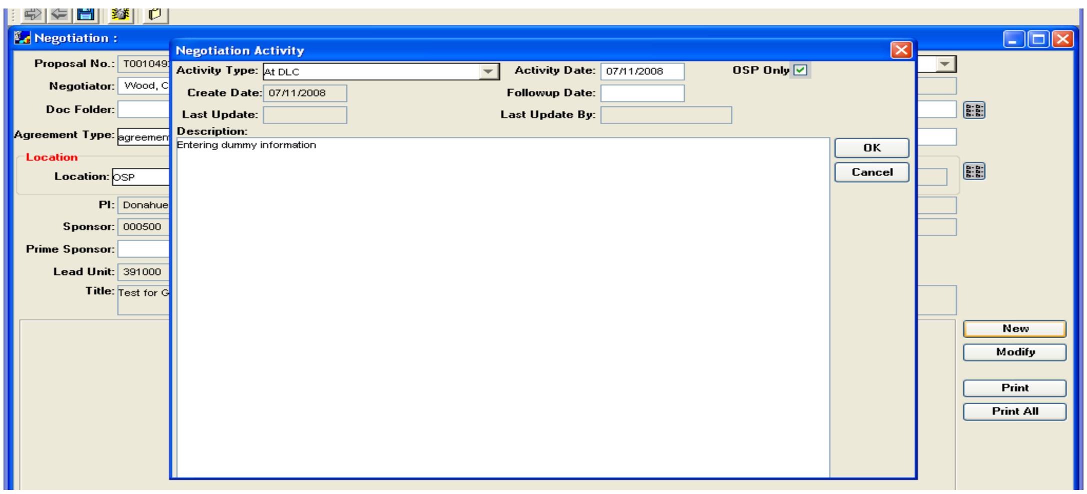
- ***Create Date -*** The date that the negotiation record is created in Coeus. This is populated by Coeus when the record is saved.

- ***Follow-Up Date –*** This is the date when follow-up should occur on a particular negotiation activity. (MM/DD/YYYY Format)

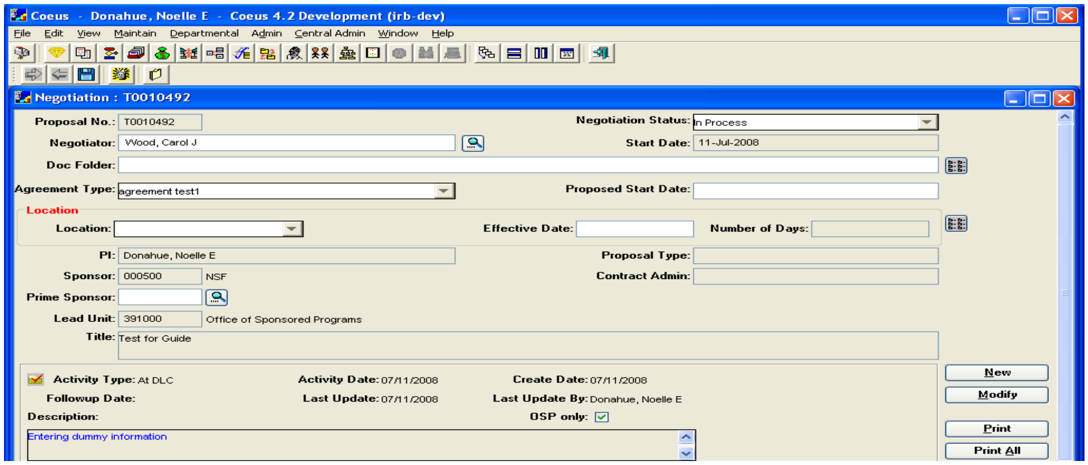
- ***Last Update –*** The date that the negotiation was last updated. This is populated by Coeus.

- ***Last Update By –*** The Coeus user who last updated the record. This is populated by Coeus when the record is saved.

- ***Description –*** This is a 2000 character limit open text box to enter your comments or notes relating to the current activity on the negotiation.

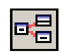


Note: You will now see your Negotiation Activity Details at the bottom of your Negotiation Screen. To add another Activity, Click **New** and repeat step 7.



8. When you have completed your New Negotiation, Click the **Save** Button  or select **File > Save**

Modifying an Existing Negotiation

1. Click on the Maintain Negotiations Button  or select **Maintain > Negotiations**

2. In the Negotiation Search Screen, enter your Proposal Log Number or you may search by Negotiator. Enter this search as lastname* in the Negotiator Search Column. Click **Find**. Your negotiation(s) will appear on your screen.

3. Select the Negotiation you wish to edit. Click the Correct Negotiation button  or select **Edit > Correct Negotiation**

4. The same screen appears as when you create a new negotiation. You may modify in two ways:

   - **Add a new negotiation activity to an existing negotiation**

     o 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.

       - Click on the **New** button on the right hand side of your screen to enter the new activity information. Follow Step 7 above.

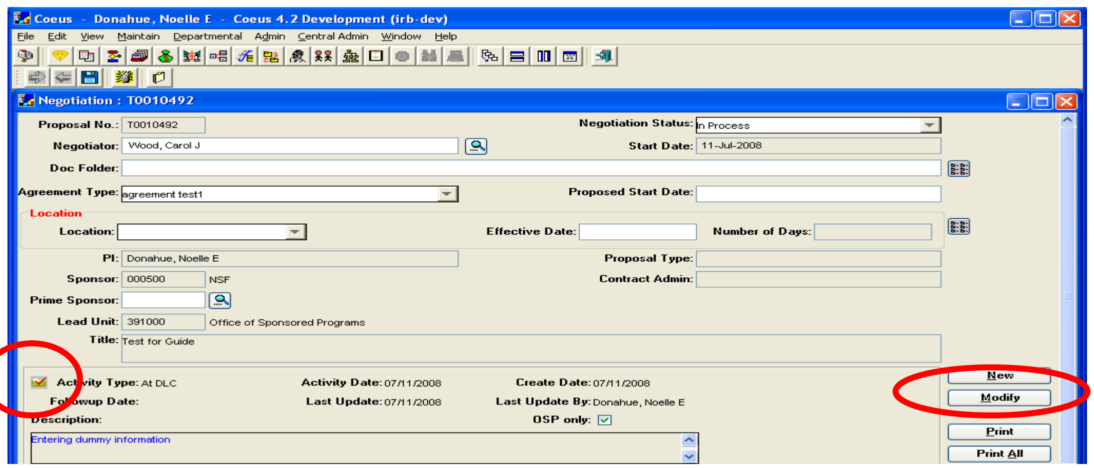
   - **Modify or correct a previously entered negotiation activity**:

- 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.

  - To modify or correct a previously entered negotiation activity, select the activity you choose to modify.

    NOTE: A checked folder image  will appear on the left hand side of the words “Activity Type”. This is the selected negotiation activity. *Only the negotiator of that record can modify or correct a previously entered negotiation activity.*



  - Click the **Modify** button on the right hand side of your screen
  - The Negotiation Activity Screen opens and you can now edit the Activity.
  - When Finished, Click the **OK** button.

NOTE: 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 needs to be maintained it is recommended that a new negotiation activity be created.***

5. When you have updated your Negotiation, Click the Save button  or select **File > Save.**

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.

In order to print the detailed negotiation activities of a Negotiation, the OSP only Check box must **NOT** be checked*. **If the OSP only Check box is checked, only the Negotiation Attributes will be printed in the Negotiation Activity Report.***

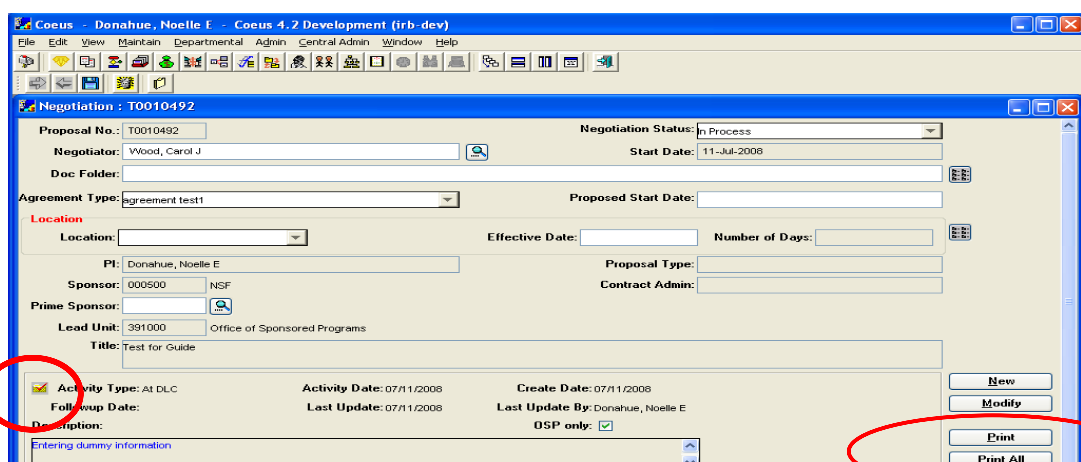
To print a report of one-selected activity:

1. Select the activity by clicking on the row of the negotiation activity that you would like to print.

   NOTE: A checked folder image  will appear on the left hand side of the words "Activity Type". This is the selected negotiation activity. *Only the negotiator of that record can modify or correct a previously entered negotiation activity.*

2. Click the Print button on the right hand side of your screen

3. A PDF of the report will be created and will open in a new window. You may now print the report.



To print a report of all Negotiation Activities:

1. Click the Print All button on the right hand side of your screen.

2. A PDF of the report will be created and will open in a new window. You may now print the report.

Note: Negotiations cannot be deleted. All negotiations will remain as historical records.