KCRM Negotiations Viewer: Quick Reference Guide

1. **KCRM** is available at: [https://kuali.bu.edu/kc/](https://kuali.bu.edu/kc/).
2. Select the Central Admin Tab.
3. Use the magnifying glass icon to access the Negotiations Search screen.

   ![Image of Negotiations Search screen]

4. Search for a Negotiation using appropriate search criteria. Use an asterisk (*) for a wildcard search.
5. When search results are returned, click to open the Negotiation record you'd like to review.

   ![Image of Negotiation record]

6. When the Negotiation record opens, it will be read only (unless you have edit access capabilities). Two panels within the Negotiations tab will open by default: Document Overview and Negotiation. These two panels display high level information about the record, including: **Status, Dates, Type, PI, Sponsor** and **Department**.

   ![Image of Document Overview and Negotiation]

   **Note:** If this Negotiation record had been associated to an Award in KC, it would show in the Negotiation Attributes section. When linked to an award, all data displayed here is from the KC Awards module.

7. Data elements be completed in the **Custom Data** panel, depending on the type of negotiation.
Viewing Negotiation Activities & Attachments

8. By default, the details of the Activities & Attachments panel is hidden. Click to open to review the details. Activities that have occurred on the negotiation will display including: **Location, Type, Dates, Description** and **Attachments** (if included). To open an attachment, click the icon next to the document. Use the Sort By and/or Display radio button to change your view of the activities.

9. By default, the details of the sub panels are hidden. Click to open to review the details.

The **Activity/Location History** sub-panel provides a summary of activities that is available to export.

The All Attachments sub-panel provides a consolidated view of all attachments for all activities. To open an attachment, click the icon next to the document.

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**Need Help?**

**User Guides Available at** [http://www.bu.edu/kcrm](http://www.bu.edu/kcrm)

**Contact the KCRM Project team at** kcrmproj@bu.edu

**Submit a help ticket by clicking the Provide Feedback link in the top right corner of every KCRM screen.**