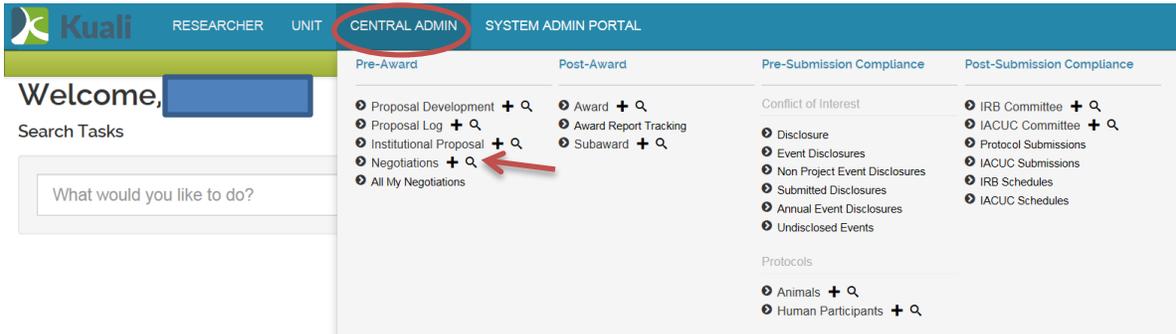


Kuali Research Negotiations Viewer: Quick Reference Guide

1. **Kuali Research** is available at: <https://kuali-research.bu.edu/kc>.
2. Select the Central Admin Tab.
3. Use the magnifying glass icon to access the 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.

One item retrieved.

Actions	Negotiation ID	Negotiation Association Type	Negotiation Association ID	Negotiation Age	Principal Investigator Full Name	Requisitioner Name	Sponsor Code	Sponsor Name	Title	Negotiator Full Name	Start Date	Negotiation Status	Proposal Type Code	Unit Number	Unit Name
open	medusa 2591	None	2320	1	JENNIFER L KING					MOHAMMED A KOUSHEH	10/19/2016	Request Acknowledged/Docs Req.			CTA Amendment

Viewing a Negotiation

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**.

Document Overview
title

* Description:

Organization Document Number:

Explanation:

Negotiation
title

Negotiation 2591

* Negotiation Status: Negotiation Dates: Start: 10/19/2016 End:

* Negotiator: MOHAMMED A KOUSHEH Negotiation Age in Days: 1

* Agreement Type: Anticipated Award Date:

Document Folder:

Negotiation Attributes:

* Negotiation Association Type: Negotiation Association ID: 2320

Title: Lead Unit:

Principal Investigator Employee: JENNIFER L KING Principal Investigator Non-Employee:

Admin Person:

Sponsor: Prime Sponsor:

Sponsor Award ID: Subaward Organization:

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.

Kuali Research Negotiations Viewer: Quick Reference Guide

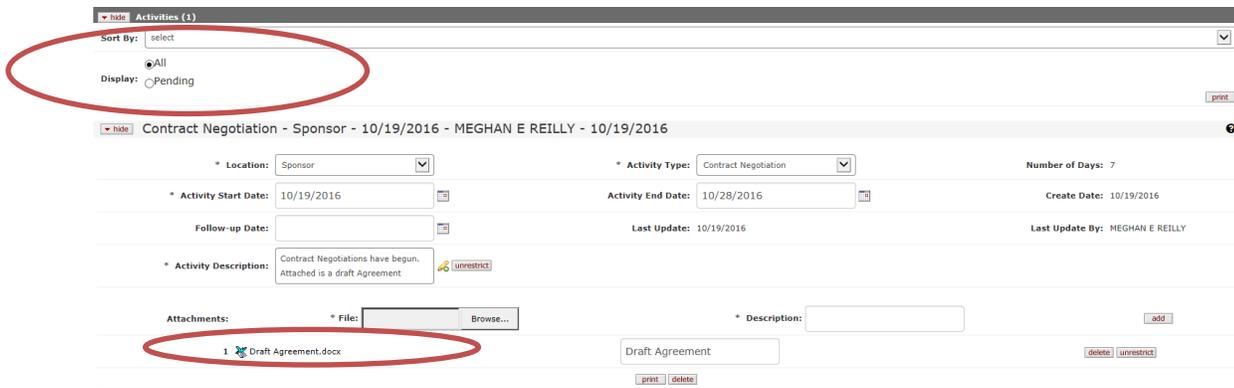
Negotiation Attributes:

* Negotiation Association Type: Award	Award: 200421-00004
Title: Test Record	Lead Unit: IS&T KUALI COEUS
Principal Investigator Employee: JENNIFER L KING	Principal Investigator Non-Employee:
Admin Person:	Prime Sponsor:
Sponsor: NIH/National Institute of General Medical Sciences	Subaward Organization:
Sponsor Award ID: 1R01GM123456-01	Requisitioner Unit:
Proposal Type:	
Requisitioner Name:	

7. Data elements can 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.



▼ hide Activities (1)

Sort By: select

Display: All Pending

▼ hide Contract Negotiation - Sponsor - 10/19/2016 - MEGHAN E REILLY - 10/19/2016

* Location: Sponsor * Activity Type: Contract Negotiation Number of Days: 7

* Activity Start Date: 10/19/2016 Activity End Date: 10/28/2016 Create Date: 10/19/2016

Follow-up Date: Last Update: 10/19/2016 Last Update By: MEGHAN E REILLY

* Activity Description: Contract Negotiations have begun. Attached is a draft Agreement. Unrestrict

Attachments: * File: Browse... * Description: add

1 Draft Agreement.docx Draft Agreement delete unrestrict

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.

History Line #	Activity Type	Location	Start Date	End Date	Activity Days	Effective Location Start Date
1	Executed Agreement	OSP	10/19/2016	10/20/2016	1	10/19/2016
2	Other	OSP	10/19/2016		1	
3	Contract Negotiation	Sponsor	10/19/2016	10/28/2016	7	10/19/2016

Export options: CSV | spreadsheet | XML

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.

Kuali Research Negotiations Viewer: Quick Reference Guide

Activity Start Date	File	Attachment Description	Location	Activity Type
1 10/19/2016	 Draft Agreement.docx	Draft Agreement	Sponsor	Contract Negotiation
2 10/19/2016	 EXECUTED AGREEMENT.docx	Fully Executed Agreement	PAFO	Executed Agreement

Need Help?

User Guides Available at <http://www.bu.edu/kcrm>

Contact the Kuali Research Project team at kcrmproj@bu.edu

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