Last updated on: 2/8/2016

Last updated by: Scott Pennelly

1. **List of Agreement Types:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **#** | **ERA AGREEMENTS STATE (STATUS) VALUES - ALPHABETICAL** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **STATISTICS LOGIC** | **DEV NOTES** |
| 1 | Canceled | ERA User can cancel a task if current state = Unassigned or Verification. They click on Cancel Task action button and select reason canceled. Then,ERA automatically sets state to Canceled. GCO Agreements Manager Role can cancel a task in any state except for Executed/Awarded or Task Completed. GCO clicks on Cancel Task activity in My Actions and selects reason canceled.Then, ERA automatically sets state= CanceledIf Task State was Suspended and automatic monthly job detects it is over 300 daysThen, ERA automatically sets state=Cancelled with reason “No Activity over 300 days”. | Task is no longer needed. Cancel Reason Codes: (these values will be in a drop down list User must select when putting task in Canceled state)* Agreement not reached
* Duplicate
* Internal party decision
* Other
* Sponsor unable to find
 | When GCO Cancels task store current date HH:MM in Date Canceled field. | Stops clock |
| **#** | **ERA AGREEMENTS STATE (STATUS) VALUES - ALPHABETICAL** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **STATISTICS LOGIC** | **DEV NOTES** |
| 2 | Executed/Awarded | Only valid for these agreement types; * CON, DUA, IP, MA, MOD, MTA, NDA, OTH, REC, SPA, SUB, TA, or ULA.

When agreement is actually finalized and we received executed agreement, the GCO selects Finalize Agreement activity from My Actions. Edits are performed first and if everything passesThen, ERA automatically sets state=Executed/Awarded | Agreement has been reached and will be signed and/or administered by ORSPA.  | When GCO Finalize Agreement then store current date HH:MM in Date Executed/Awarded field.  | Stops clock |
| 3 | Negotiating  | When a GCO has all the informationThen, GCO manually changes state=Negotiating on the Negotiation Information page.  | Task verification complete. GCO preparing and initiating aimed at reaching an agreement.  |  | Counts as time In Contracts |
| 4 | Signature Process | When task complete except for final signature a GCO can optionally give PNT Student Workers the process of obtaining a signature and distributing. If elected then, GCO manually changes state=Signature Process on the Negotiation Information page.  | Student(s) will work off the Agreements Home page under the [All] tab and sort by State. Tasks will not be assigned to them; instead they will work from the Queue. This way task remains on GCO work queue and they do not loose viability of it. A majority of GCO’s prefer to obtain a signature and distribute them however leaving the option open to have Students assist when GCO workload is high |  | Counts as time In Contracts |
| **#** | **ERA AGREEMENTS STATE (STATUS) VALUES - ALPHABETICAL** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **STATISTICS LOGIC** | **DEV NOTES** |
| 5 | Suspended | Any time an internal/external party indicates to put the task “on hold” for a while Then, GCO manually selects activity Suspend Task, ERA automatically sets state= SuspendedThis way all the information/notes already gathered are kept however the clock days are put in a Suspended bucket. When task is re-established then GCO will manually change state.  | Task is intended to be Completed or Executed/Award by Sponsor or External Party or Internal PartySuspend Reason Codes: (these values will be in a drop down list User must select when putting task in Suspended state)* Change of technical direction
* Delayed approval processing
* Intent to fund but funding limitations
* Other- Write-in
* External Parties non-responsive to multiple requests
 | When GCO Suspends task store current date HH:MM in Date Suspended field.  | Counts as time in Suspended |
|  6 | Task Completed | Only valid for these agreement types; * PCA, RFP, or TEM

When task is complete Then, GCO manually selects activity Complete Task, Edits are performed first and if everything passes then, ERA automatically sets state= Task Completed.  | Task is for a specific agreement type and actions requested are completed.  |  | Stops clock |
| 7 | Unassigned | When Task Request page is first saved a unique Task ID is assigned Then, ERA automatically sets state= Unassigned | Task has been created, received and pending GCO assignment.  | After record is created store current date HH:MM in Date Request Logged field.  |  |
| **#** | **ERA AGREEMENTS STATE (STATUS) VALUES - ALPHABETICAL** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **DEFINITION/ACTION THAT CAUSES STATUS CHANGE** | **STATISTICS LOGIC** | **DEV NOTES** |
| 8 | Verification | When GCO is Assigned via Assign Owner activity Then, ERA automatically sets state= Verification and creates a Snapshot. | Task has been assigned a GCO verification of task in accordance with internal requirements.  | When GCO is assigned store current date store current date HH:MM in Date Assigned field.  | Counts as time In Contracts |
| 9 | With External Parties | Any time GCO needs response from Sponsor or outside Party Then, GCO manually selects activity Move to External PartiesERA automatically sets state=With External Parties | Task is with Sponsor for comment or acceptance.  |  | Counts as time With External Parties |
| 10 | With Internal Parties | Any time GCO needs response from another area internally; PI, RA, ORIA, AzTE…Then, GCO manually selects activity Move to Internal Parties ERA automatically sets state=With Internal Parties | Task requires guidance, approval from an ASU internal party.  |  | Counts as time With Other Internal Parties |