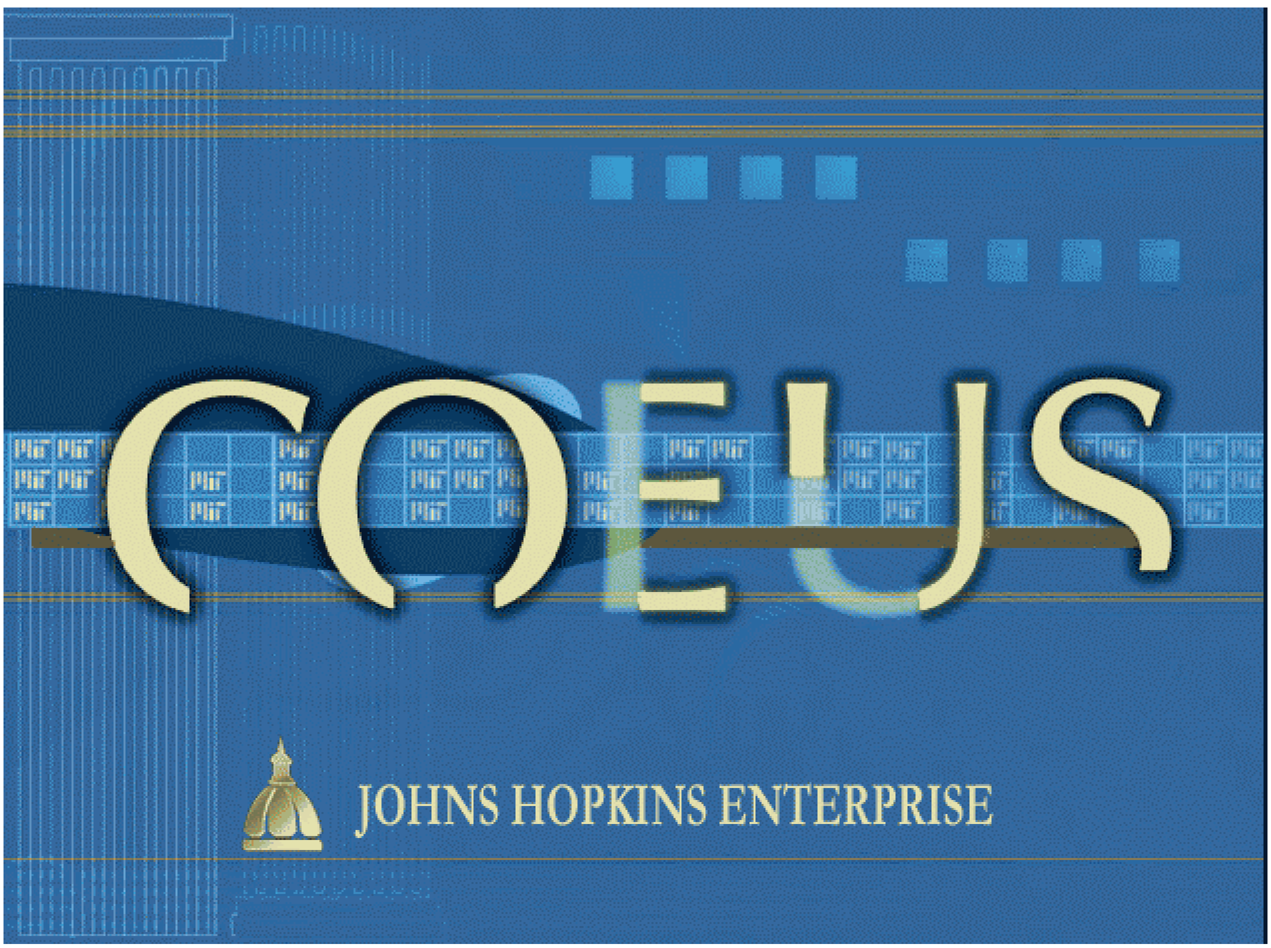
Coeus® Version 4.4.3

COEUS PREMIUM PROPOSAL DEVELOPMENT

POINT AND CLICK

USER GUIDE



Document Date: October 2010

This user guide takes you through the steps in creating BASIC proposals; point here, click there!

If you have questions or need to do something not described here…

***check the full User Guide*!!!**

EVERYTHING is explained there!

Remember: the full user guide is found from within Coeus at
Help>Help Topics and is SEARCHABLE…
find the topic you need fast by entering a search term and going right to that subject.

★ *BEFORE BEGINNING* ★

PUT COEUS PREMIUM ONTO YOUR COMPUTER

Use the access instructions on the last page to put Coeus Premium onto your computer.
Your LAN administrator may have to do this if you don't have administrator rights.

PROPOSAL CREATOR ROLE

To create proposals, you need a user account and the proposal creator role.
User accounts are currently maintained by ORIS – your department admin should contact
coeus-help@jhu.edu to let us know how we should set up your account and roles.

Once you have an account: **Use your JHED credentials to log in to the system**.

EDIT VS DISPLAY MODE

If a proposal development record is open, but

the fields are grey and you can't change anything,

you are looking at the proposal in **display mode**.

Exit the proposal and return to the search screen.

Click on the Edit button on the second row of icons.

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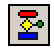
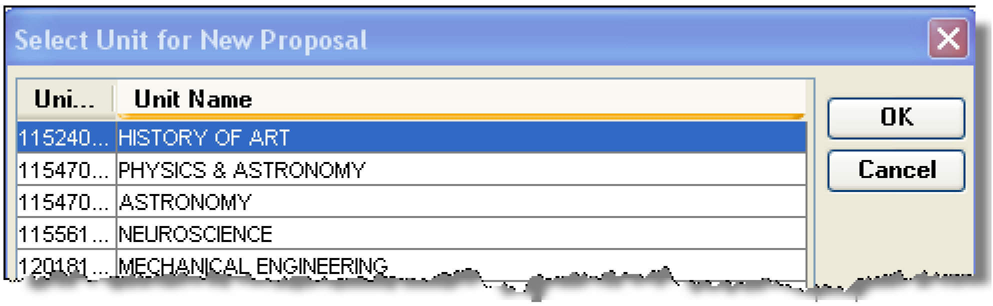
CREATING NEW PROPOSALS

CREATING AN ORIGINAL PROPOSAL

1. Click the **Maintain Proposal Development** icon . Close the search screen.

2. Click the **Add a New Proposal** icon .

   Select the unit that will create this proposal and manage the project. Click **OK**. (If you don't get this window, you can only create accounts in one unit.)

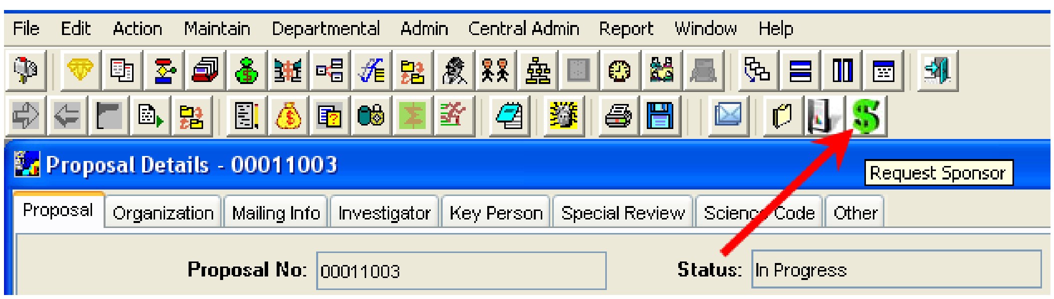


3. A new PROPOSAL DETAILS screen opens.

4. Make a note of the proposal number so you can easily return to this proposal AND so you can refer to it if you need help from coeus-help@jhu.edu.

5. Fill out the appropriate fields on the Proposal Tab. If you have questions about the fields – consult the FULL USER GUIDE.

6. If you need to request a new sponsor, from within the proposal development record, click on the "Request a New Sponsor" icon. This will take you directly to a web form to request the sponsor.



CREATING A NEW PROPOSAL BY COPYING

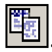
When copying a proposal, it is important to note that some data maintenance will need to be done, for example:

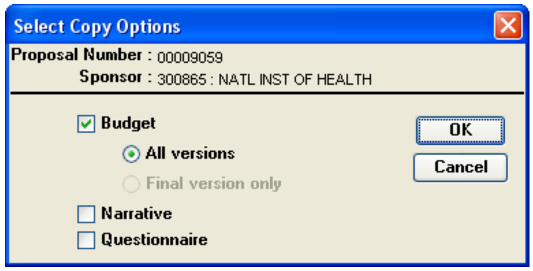
Certain items are not copied
Certain changes will need to be made
Certain things should be verified
A Grants.gov link may be copied; however the opportunity referenced MAY no longer be in effect.

The full user guide has the details!

TO COPY THE PROPOSAL

1. Click the **Maintain Proposal Development** icon .

2. Enter search criteria.
3. Click **Find**.
4. Select the proposal to copy by single-clicking anywhere in its row.
5. Click the **Copy Proposal** icon .

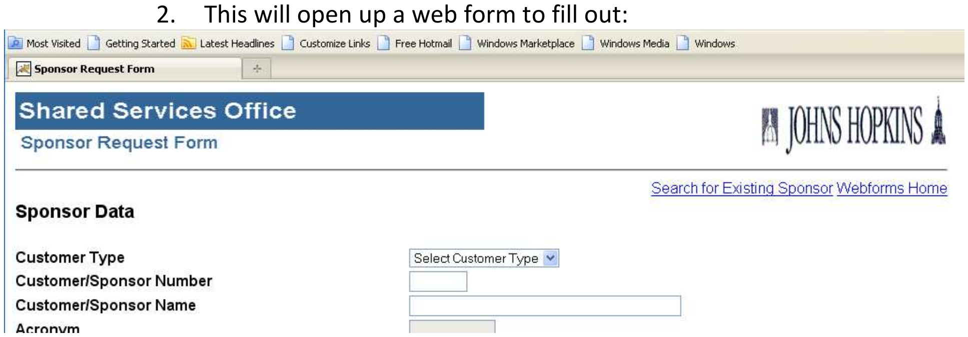


6. Make your selections for Budget, Narrative and Questionnaire.
7. Click **OK**.
8. Select the unit that will process this proposal and click **OK**.
9. A line for the copied proposal displays in the DEVELOPMENT PROPOSAL LIST, but not necessarily in the top position. To find the new proposal, sort the list in reverse order by clicking in the list header next to "Proposal Number."

10. Select the line in the Development Proposal List for the new proposal. Click the **Edit** icon .
11. Make changes to the proposal.
12. Click the **Save** icon .

ADDING A NEW SPONSOR

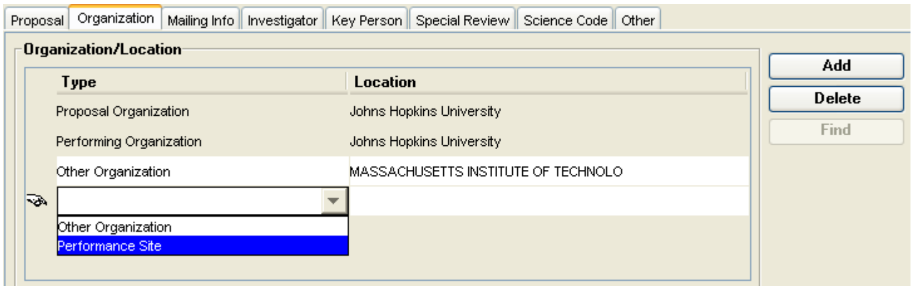
1. Click the request a new sponsor icon. 
2. This will open up a web form to fill out:



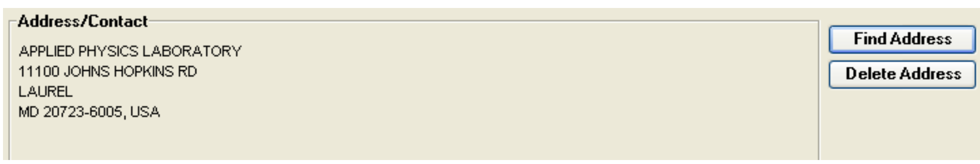
Organization Tab

Adding A Performance Site

1. Click the **Add** button.



2. Select the **Type** from the drop-down list of the new line: select **Performance Site or Other Organization**. Use Other Organization ONLY if you have to supply the DUNS number (find out from the FOA).
3. Type a contact or organization name in the blank Location Field.
4. Click **Find Address** and search. Select the address and click **OK**.



Adding a Congressional District (for other organizations only)

Select the **Add District** button to create an entry field. Enter the appropriate code. Congressional District should be represented in this form:

MD-007	for district benefit
MD-All	for statewide benefit
US-All	for nationwide benefit
00-000	for international benefit

Check the FOA to see if you need this!

Mailing Info Tab

The Mailing Info tab specifies the date by which the sponsor must receive the proposal. It also helps your ORA prioritize their reviews based on deadlines.

A little piece of info, but IMPORTANT!

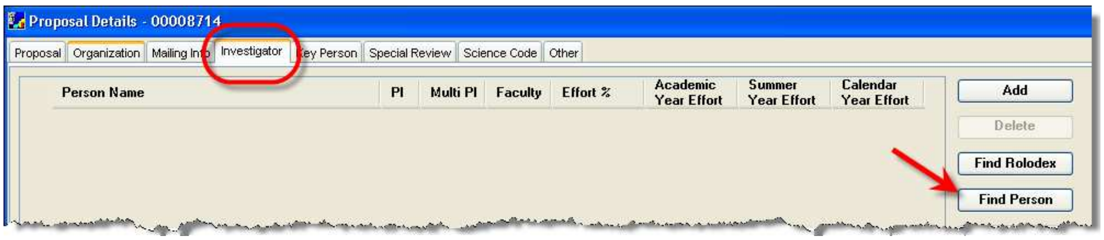
1. Open the Mailing Info tab.
2. **Date** — Enter the date the proposal is due to the sponsor.
3. **Mail By** — Select either **OSP** or **Department** to indicate who will submit the proposal.
4. **Type** — Select the option button for the carrier that will deliver the proposal.
5. The other fields are for your convenience only.

INVESTIGATOR TAB

Identify ONLY Johns Hopkins University Principal Investigator (PI), Multiple Investigators, and Co-Investigators. Enter estimated percent effort over the entire project period.

LISTING INVESTIGATORS

1. Open the INVESTIGATOR tab of the PROPOSAL DETAILS screen.



2. Click **Find Person.**
3. Enter a search term in the **Full Name** field.

*HINT: use *lastname**

4. Click **Find**.
5. Click to select the row that has the investigator's name and click **OK**.
6. Enter the estimated full project effort, or leave the **% Effort** fields blank.
7. Make sure the PI box is checked for the PI. All others listed on this tab without PI checked or Multi-PI checked are named Co-Investigators.

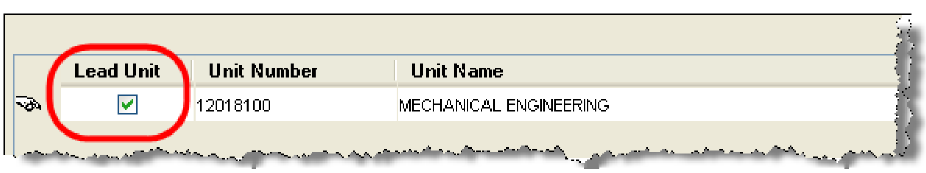
The 5 ORAs have different rules about % effort - check to see how they want you to use the system!

8. Select **Multi-PI**, if appropriate, for all Investigators that will be Multiple PI's. (NIH only!)
9. Repeat steps *2* through *7* to add other investigators to this list.

INDICATING THE LEAD UNIT

The Lead Unit of the PI MUST MATCH the Lead Unit of the Proposal.

Click to select the PI's name.



1. Select the **Lead Unit** checkbox. If the PI's unit matches the unit for the proposal, stop. If the units don't match, a message displays.
2. Click **Yes** to change the PI's unit.
3. If you click **No, a**dd the PI's primary unit or any other appropriate reviewing units for this PI..

ADDING A UNIT

1. If you know the unit number:
   a. Click **Add Unit**. An empty field opens.
   b. Enter the unit number in the **Number** field. Press the **Enter** key. The **Name** field is filled in.

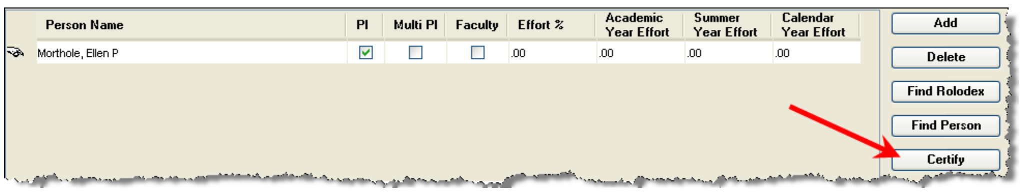
2. If you *do not* know the unit number:
    a. Click **Find Unit**
    b. Enter search criteria using asterisks if necessary. Click **Find**.
3. Select the appropriate entry from the results list. Click **OK**.

Don't list external people on the Investigator tab - we can't certify people who aren't here!

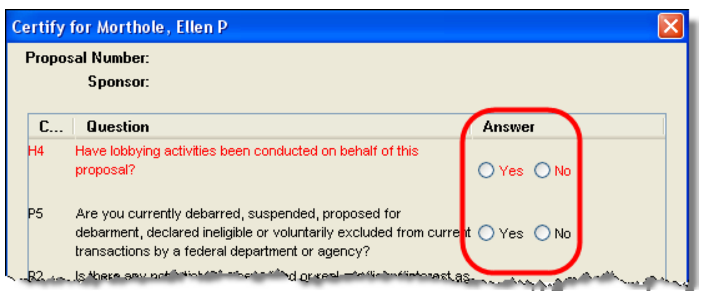
CERTIFYING THE INVESTIGATORS

The Principal Investigator, Multi-Investigators, and Co-Investigators must be certified.

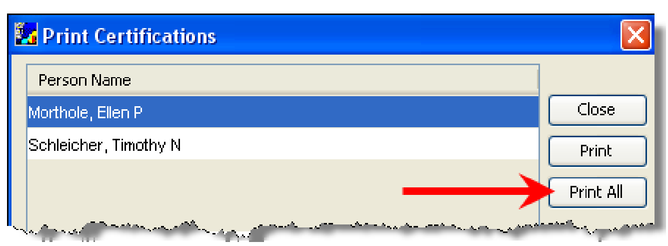
1. Select a name in the Person Name list.
2. Click **Certify**.



3. Click the appropriate **Yes** or **No** option button for each question.



4. When you have answered all questions, click **OK**.
5. When you have finished filling out an electronic certificate for each Investigator, you may choose to print the certifications. Select **Action > Print Certifications…**.



6. Click **Print All**. A PDF file of the certifications is created.

KEY PERSON TAB

Identify **both JHU and external-to-JHU key people** for the project.

LISTING KEY PERSONS WITHIN JOHNS HOPKINS

1. Open the KEY PERSONS tab of the PROPOSAL DETAILS screen.

2. Click **Find Person**.
3. Enter a search term in the **Full Name** field.
4. Click **Find**.
5. Click to select the row that has the person's name. Click **OK**.
6. Enter the project role in the **Role** field. This is what's printed on forms.
7. Enter the estimated full project effort, or leave the **% Effort** field blank.
8. If this person is a faculty member, verify that the **Faculty** checkbox is selected.
9. Repeat steps *2* through *8* to add others to this list.

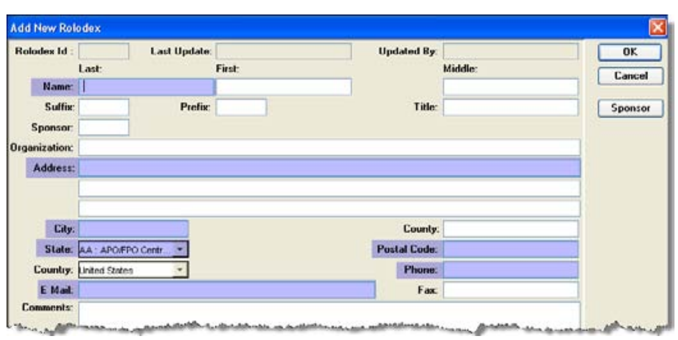
Be sure to change the directory title to the role on the project!

LISTING KEY PERSONS FROM OUTSIDE OF JOHNS HOPKINS

1. Click **Find Rolodex**.
2. Enter search criteria.
3. Click **Find**.
4. Click to select the row that has the person's name. Click OK.
5. Enter the project role in the **Role** field. This is what's printed on forms.
6. Enter the estimated full project effort, or leave the **% Effort** field blank.

ADDING A NAME TO THE ROLODEX

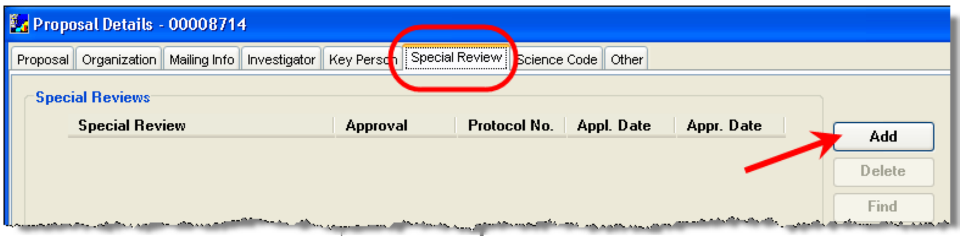
1. Click the **Maintain Rolodex** icon .
2. Click **Cancel** to close the ROLODEX SEARCH window.
3. Click the **Add** icon  or select **Edit > Add**.



4. Complete the ADD NEW ROLODEX form. At a minimum, the highlighted fields are required:
5. Click **OK**. The Rolodex window now has a line for this entry.

SPECIAL REVIEW TAB

1. Open the SPECIAL REVIEW tab.



2. Click **Add**..
3. Insert details in these fields:
   - **Special Review** — Select a category for the special review from the drop-down list.
   - **Approval** — Select the current status of the special review from the drop-down list.
   - **Protocol** — If you have a protocol number, enter it.
   - **Appl. Date** — If the application has been submitted for review, enter the date applied.
   - **Appr. Date** — If approval has been granted, enter the approval date.
   - **Special Review Comments** — If the status in the **Approval** field is **Exempt**, this field must contain *only* the exempt code. If there are multiple codes, separate them with commas (for example: **E4, E6**). For other statuses, add comments if desired for the line selected.

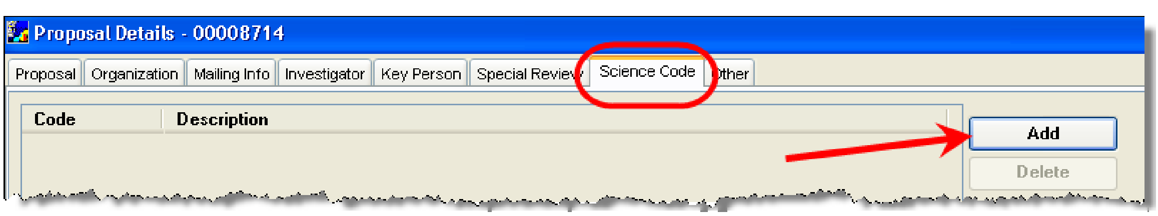
4. Repeat steps *2* and *3* to add other special reviews.
5. Click the **Save** icon .

SCIENCE CODE TAB

Johns Hopkins uses this data to identify populations served by this proposal for reporting needs.

ADD A SCIENCE CODE

1. From the SCIENCE CODE tab, click **Add**.



2. Enter an asterisk in the field for Code. This displays all of the Science Codes used by Johns Hopkins.

3. Select a result or results. Select OK to apply the code(s).

OTHER TAB

1. AOR NSPIRES User Name - Used for NASA Grants.Gov Submissions only. The AOR is typically the person in Research Administration who submits the proposal to Grants.Gov.

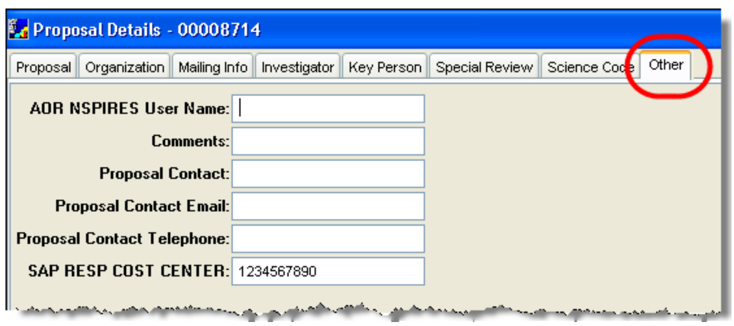
2. Comments – This field allows 255 characters for specific notes that may be necessary or helpful to approvers.

3. Proposal Contact – Who should Research Admin contact with questions about the proposal.

4. Proposal Contact E-mail –The e-mail address of the Proposal Contact.

5. Proposal Contact Telephone – The telephone number of the Proposal Contact.

6. **SAP RESP COST CENTER - This is a required field** to workflow the proposal development record. Enter the full 10-digit responsible cost center for the proposal.



Personnel Attachments

(BIOGRAPHICAL SKETCHES, CURRENT & PENDING…)

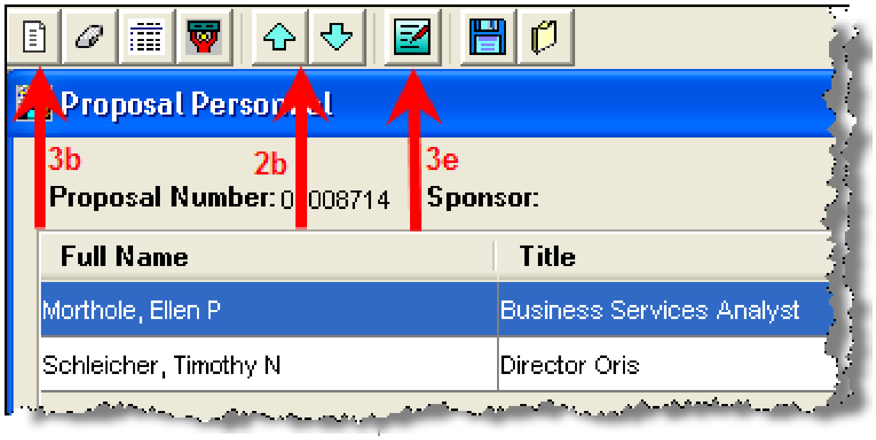
Personnel attachments are required for everyone listed in the INVESTIGATOR and KEY PERSON tabs.

Note: File names containing a “special character” will cause a submission error at Grants.Gov, even though the proposal may pass Coeus validations. Special characters include spaces, as well as characters such as

” , / , \ , () , * , & , ^ , > , % , $, # , ! , and @.

CHANGING THE ORDER OF PROPOSAL PERSONNEL

1. Click the **Proposal Persons** icon .



2. To change the order in which names appear in this window and are printed on forms:
    a. Click on a name.
    b. Click the **Move Up** or **Move Down** icon.

Uploading Personnel Attachments

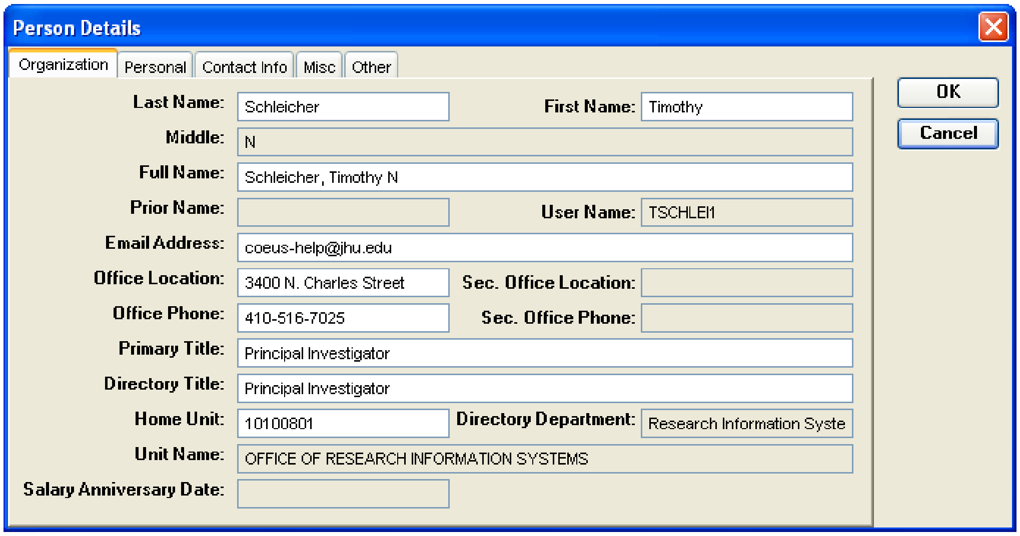
1. Click on a name.
2. Click the **Add Module** icon .
3. Enter a description in the **Description** field.
4. Make a selection in the **Document Type** drop-down list.
5. Click the **Upload Attachment** icon .
6. Navigate to the needed file, select the file and click **Open**.
7. Repeat steps 1 through 7 to upload other attachments for each person.

Deleting Personnel Attachments

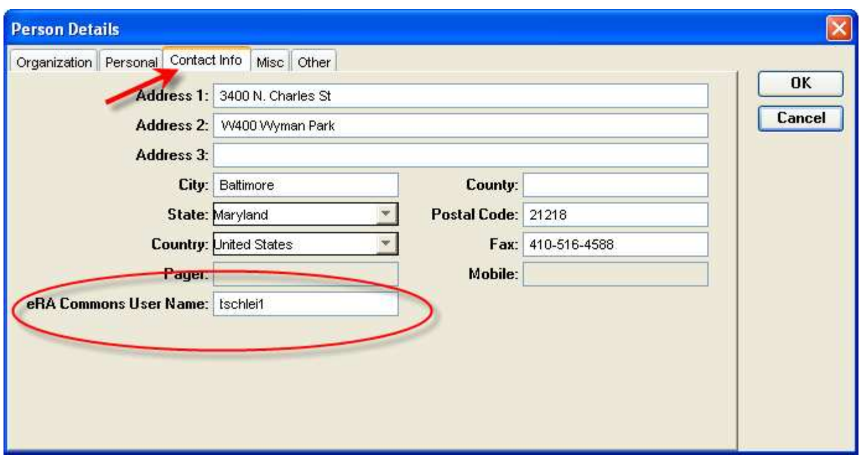
1. Select the name of the person whose personnel attachment you will delete.
2. Click to select the attachment to delete.
3. Click the **Delete Module** icon .
4. A confirmation message displays.
5. Click **Yes** to delete the attachment or **No** to stop

Editing Proposal Person Details

1. Click the **Proposal Persons** icon .
2. Select the name of the person whose contact data requires revisions.
3. Select **Edit > Person Details**.



4. **For NIH proposals**: Degree information for PI's is now collected from the eRA Commons profile.
5. **The RR Key Person Expanded** form has a field for Degree Type and Year Graduated. To fill in these fields, enter that information on the "Personal" tab in this window.
6. **For NIH proposals:** Be sure to enter the NIH eCommons User ID on the Contact Info tab if this data is not present.

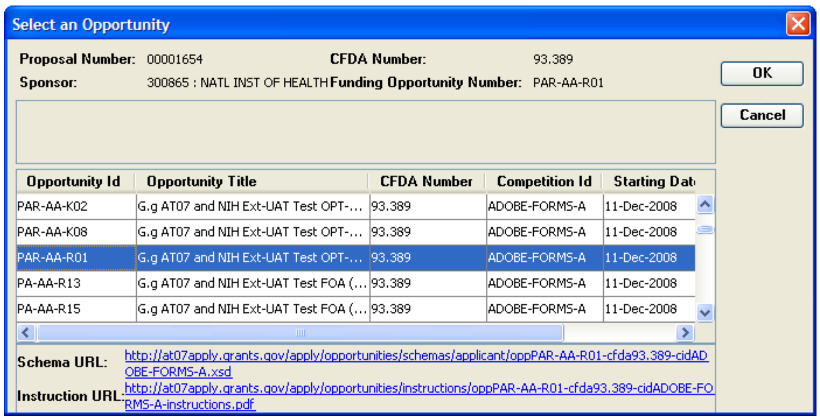


Only do this step for the PI! If you enter data for others, NIH will match it for everyone and will return an error if there is any sort of difference!

7. **For NIH K proposals:** select the Other Tab (image below), and for the field Citizenship, use the search button and make the appropriate choice from the list presented.

Linking the Proposal to a Grants.Gov Opportunity

1. On the Proposal tab, insert the federal sponsor code in the **Sponsor** field.
2. If you do not know the sponsor code, do the following:
   a. Click the **Search** icon next to the field.
   b. Enter the **Sponsor Name** or **Acronym** in the appropriate column and click **Find**.
3. Enter either a **Program No.** or **CFDA No.** in the appropriate field of the Proposal tab**. Do not enter both.**
4. Select **Action > Grants.Gov**.



5. Select the opportunity from the list click **OK**.
6. Click **Close** in the Grants Gov Submission Details window. The window closes, and the Grants.Gov logo (circled below) displays near the bottom of the Proposal Details screen.

Review Grants.Gov Forms

A proposal is eligible for electronic submission via Grants.Gov if all mandatory forms are available.

1. From a proposal is connected to Grants.Gov, select **Action > Grants.Gov**.
2. The Grants Gov Submission Details window opens.
3. Click the Forms tab. A list of forms displays.
4. Check that all forms marked Mandatory are also tagged Available.
5. Click the box in the **Include** column (circled) to add optional forms to your application.

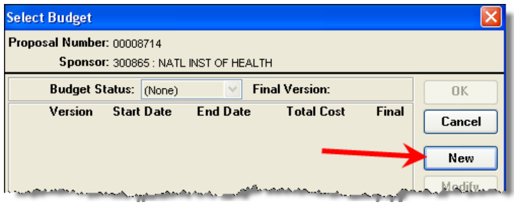
CREATING A NEW BUDGET

Subawards are explained in detail in the full user guide.

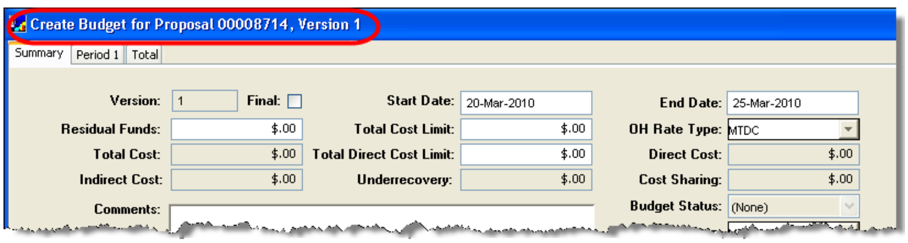
Remember, look to the **full user guide** for more information and full explanations of all things Coeus!

OPENING A BUDGET

1. From the PROPOSAL DETAILS screen click the **Proposal Budget** icon .
2. Click **New**.



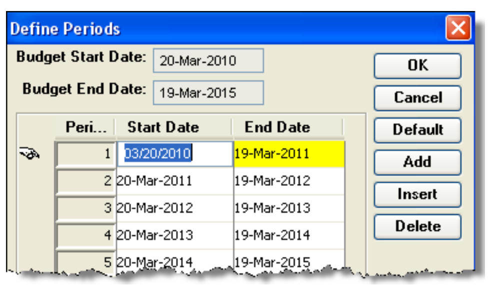
3. The Create Budget for Proposal Screen opens:



ADJUSTING PERIOD BOUNDARIES

Coeus default to create 12-month budget periods, but you can adjust the number of periods and their lengths based on sponsor requirements.

1. Select **Budget Periods > Adjust Period Boundaries**.

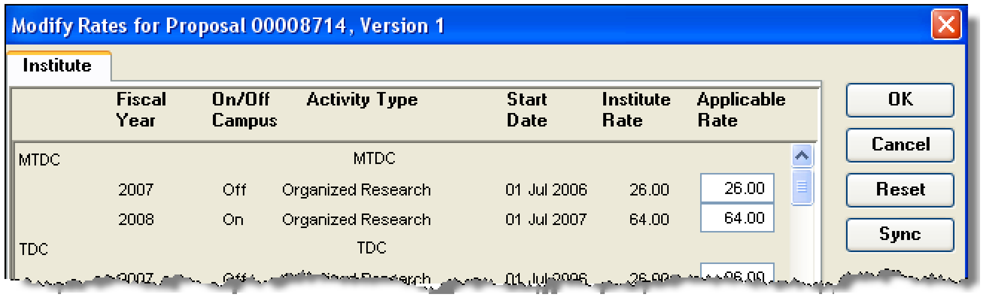


2. Use the buttons for the following actions:
   a. **Add** — Add a period at the end of the list.
   b. **Insert** — Insert a period before the selected period. To select a period, click in the row.
   c. **Delete** — Delete the selected period.
   d. **Default** — Sync to the default 12-month periods defined by the **Start Date** and **End Date** on the SUMMARY tab.
3. Click in the **Start Date** or **End Date** field and enter or revise the date in **mm/dd/yyyy** format.
4. Click **OK** to save changes or **Cancel** to take no action. Any changes are reflected in the grid at the bottom of the SUMMARY tab.

ADJUSTING PROPOSAL RATES

There's a subtle difference between "reset" and "sync" - explained in the full user guide.

1. Click the **Maintain Rates for the Proposal** icon .



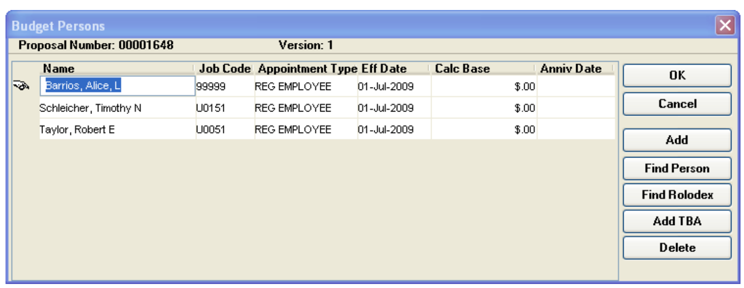
2. Change a rate by clicking in the appropriate **Applicable Rate** field and entering the new rate.
3. Click **OK**. A verification message opens: "Saving will entail recalculation of the budget. Continue?"
4. Click **Yes**.

RETURNING TO DEFAULT RATES

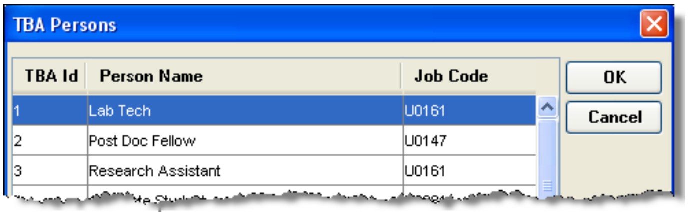
To return to the currently applicable rates, open the MODIFY RATES window and click **Sync**.

BUDGET PERSONS LIST

1. From the PERIOD 1 tab Click the **Budget Persons** icon The BUDGET PERSONS window opens, already showing the names from the INVESTIGATORS and KEY PERSONS tabs.



2. Add other named personnel to the list.
   - Click **Find Person**.
   - Enter search criteria. Click **Find**.
   - Click a name to select it.
   - Click **OK**.
3. Add placeholders for any personnel who do not need to be named. There are **two methods**:
   - **TO USE THE ADD TBA FEATURE:**
     1. Click **Add TBA**.
     2. The TBA PERSON window opens listing the maintained To Be Announced placeholders.
     3. From the list, select placeholders that reflect the positions needed.



4. Click **OK**.

- **To Use the TBA search method:**

Using the second method is best, if you want PGY salary info to automatically populate the budget.

  1. Click **Find Person**. The Person Search window opens.
  2. Enter "TBA*" as the search criteria.
  3. Click **Find**. The Person Search Result tab opens, listing the TBA positions.
  4. Click an entry to select.
  5. Click **OK**. The Person Search window closes, and the focus returns to the Budget Persons window, which now contains the TBA persons you located.

4. Do the following for each row in the list:
   - Accept the suggested job code, or make an entry in the **Job Code** field.
   - Check the **Appointment Type** field to confirm the appointment is correct for this proposal. To change it, click in the **Appointment Type** field to display the drop-down list.
   - Enter the person's base salary in the **Calc Base** field. This is the annual salary as of the project period start date.
   - The **Eff Date** field defaults to the start date of the proposal, however if planned salary increases are expected, more precise amounts are obtained when you enter the effective date of the new salary.
   - **Anniv Date** is the person's salary anniversary date. Coeus prorates salaries based on the individual's salary anniversary data in SAP (this data field can be edited in budget persons window if the default data is not correct
5. Click **OK**. The Budget Persons window closes.

Creating the Budget from Period 1

Populate Period 1 only with line items that will recur in every period. Coeus uses Period 1 as a base to calculate amounts for future periods.

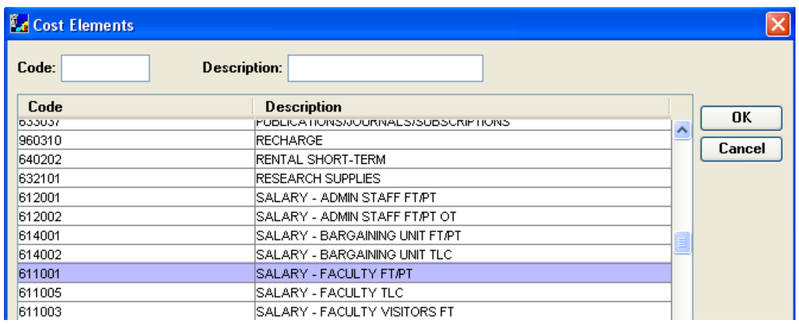
To create the budget for Period 1, enter line items for personnel salary, non-personnel costs, and subcontract expenses.

Personnel Line Items and Adding Names

1. From the Period 1 tab of the Create Budget screen, click the **Add Line Item** icon .

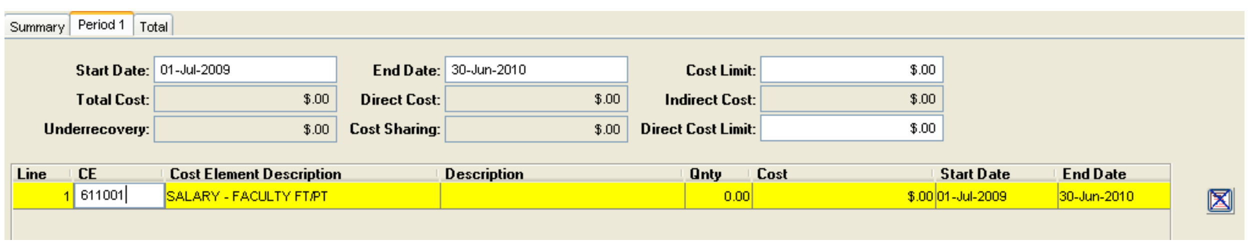
2. Double-click the **CE** field.

3. From the Cost Elements window, click to select a salary cost element and click **OK**.



Note: If you need to remove inflation or mark a line as on or off campus, make the change PRIOR to naming people to the line! See Adjusting Line Items below!

This enters the cost element into the line item:



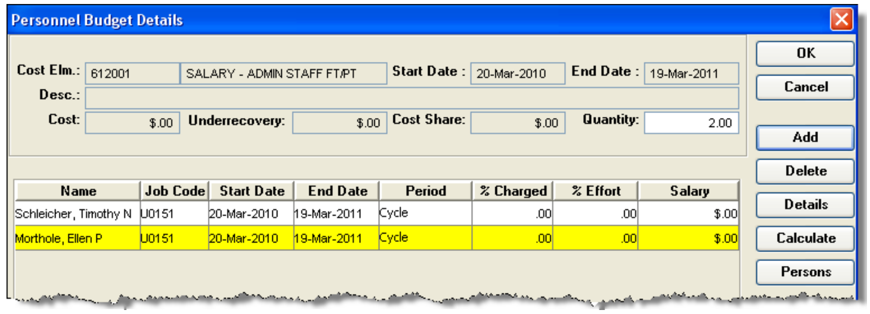
4. With the line item still selected, click the **Personnel Budget for Line Item** icon .

5. Click **Add**. The SELECT BUDGET PERSONS window opens showing only those people who can be budgeted against the cost element.

6. Select the appropriate person(s) from the list.

7. Click **OK**. The people selected will be reflected in the Budget Details window.

To accommodate changes in effort over time, people may be listed more than once, with different dates and effort percentages.



8. Make entries or adjustments to fields in the PERSONNEL BUDGET DETAILS window:

   a. **Start Date** and **End Date** — Change one of these dates to compensate for such occurrences as vacation eligible time or a late start on the project. Change to the appropriate dates for faculty summer period (that is, June, July, or August).

   b. **Period** — Select the appropriate appointment type from the drop-down list.

   c. **% Charged** — Enter the percentage of the person's salary to be charged to the project.

   d. **% Effort** — Enter the percentage of a 40-hour work week this person will charge to the project.

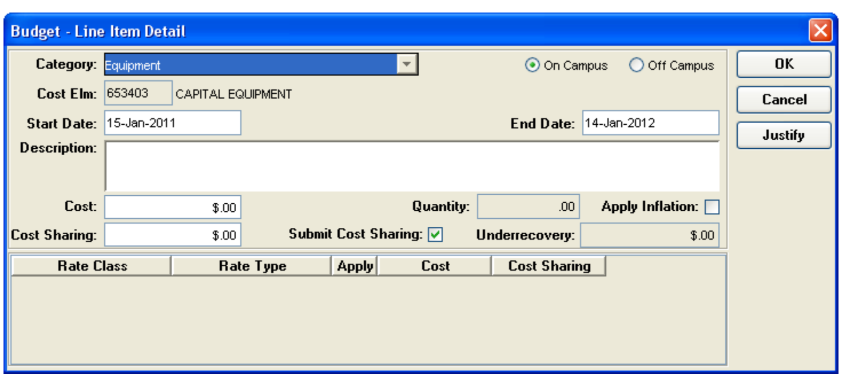
9. Click **OK**.

10. Click the **Save** icon .

ADJUSTING LINES: INFLATION, ON/OFF CAMPUS, CHANGING A COST CATEGORY

If these adjustments will be made for personnel lines, the changes MUST BE MADE PRIOR to naming people to the line:

- With the line item highlighted, double-click in the **Description** field. THE BUDGET – LINE ITEM DETAIL window opens:



Note that several changes can be made, such as category. This is most often used to tell Coeus not to inflate, or to flag an item as off-campus.

- Make changes as necessary in these fields:
  - **Category** — Change the category, if necessary.
  - **Description —** A description of the line item. This is required for equipment.
  - **Cost —** The total cost for the line item. Costs can be entered to the penny. They are rounded to the nearest dollar when printed to most forms, but the value entered is used in calculations.

- **Quantity** — This field can be left blank, since it is for your records only. This value does not affect the line item. That is, the cost is not multiplied by the quantity to calculate the total cost of the line item.
- **Apply Inflation** (checkbox) — Checked by default on most cost elements to increase costs in later periods. This box can be unchecked so inflation will not be applied to this item when periods are generated.
- **Cost Sharing** — If applicable, the amount to be funded by another source.
- **Submit Cost Sharing** – Default is checked; uncheck this box to keep the amount of cost sharing off of the FedNonFed form.
- Click **OK.**

Adding Non-Personnel Line Items

Non-personnel line items are for expenses such as equipment and travel. You enter the costs directly in the line item or the Line Item Detail window.

Do this for each non-personnel direct-cost line item:

1. Click the **Add Line Item** icon .
2. Double-click the **CE** field.
3. Select the appropriate cost element and click **OK**.
4. Make any changes necessary to the Budget – Line Item Detail window as in #4 above.
5. Click **OK**.
6. Click the **Save** icon

Generating the Remaining Budget Periods

Create the remaining budget periods from the Period 1 budget.

1. Check that all budget items that will be needed in future periods are in the Period 1 budget.
2. Click the **Generate All Periods** icon .

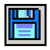
   A tab is created for each period generated. Each tab displays the same line items as Period 1, but with costs inflated by the rate specified. The Total tab displays totals for the project.
3. Click the **Save** icon .

Adding a Line Item to One or More Periods

1. Open the tab for the first budget period you want to add the line item to.
2. Follow the instructions in *Adding Personnel Line Items*, or *Adding Non-Personnel Line Items*.
3. To apply the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
4. Click the **Save** icon .

Changing a Line Item and Applying It to Later Periods

1. Open the tab for the first budget period in which you want to change the line.
2. Click to select the line item to change. The line is highlighted in yellow when selected.

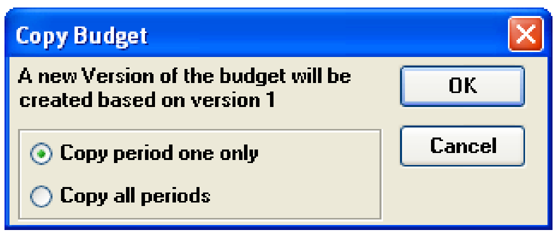
3. Do one of the following, depending on the type of line item you are changing:
4. For a personnel line item, click the **Personnel Budget for Line Item** icon . Make the change in the Personnel Budget Details window and click **OK**.
5. For a non-personnel line item, double-click the line and make changes in the Budget – Line Item Detail window. Click **OK**.
6. To add the line item to later periods, click to select it and select **Items > Apply to Later Periods**.
7. Click the **Save** icon  or select **File > Save**.

Creating a New Budget Version

Copying an Existing Version

Although you can keep modifying the same budget, making new versions is a super way to keep a "history" of changes made over time.

1. Open the Select Budget window
2. Click to select the version to copy.
3. Click **Copy**.
4. Select one of the options buttons depending on the type of changes you will make:



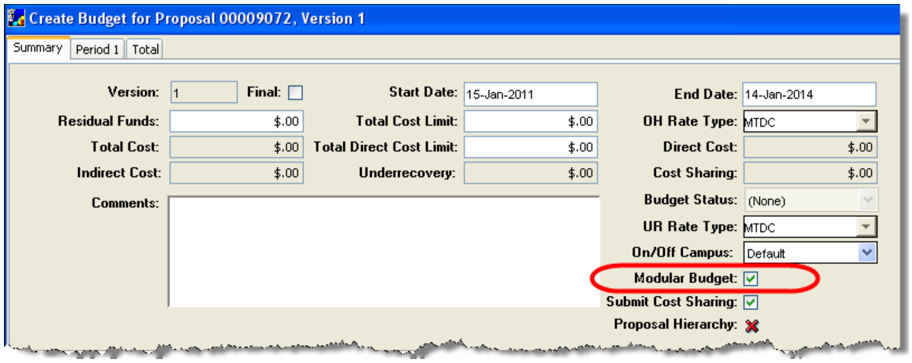
   a. If you will make a minor change that occurs in one or two line items, copy all periods.
   b. If you will make extensive changes to staff, effort, or line items, copy only Period 1 and generate the remaining periods.
5. Click **OK**.
6. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Creating a Version without Copying

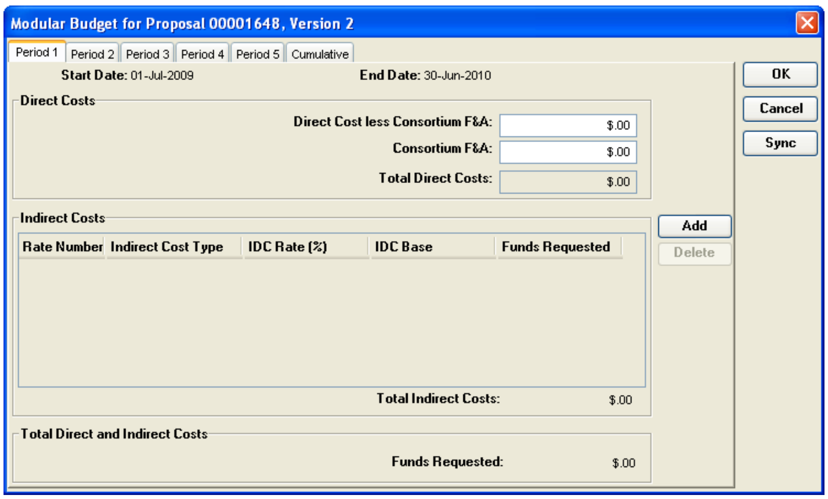
1. Open the Select Budget window.
2. Click **New**.
3. Create the new budget version. Refer to preceding sections of this chapter for instructions.

Creating a Modular Budget from a Detailed Budget

1. Create the budget as explained in preceding sections.
2. On the budget Summary tab select the **Modular Budget** checkbox (circled below).



3. Select **Edit > Modular Budget**.



Check with your ORA on how they want you to use modular budgeting. Even though Coeus doesn't require budget details on the budget summary tab when using a modular budget, your ORA may.

4. Click **Sync**.
   - Coeus synchronizes the modular budget with the budget you created,
   - suggests the number of $25,000 modules, and
   - uploads the calculated indirect costs and rates for each budget period.
   - ***Be sure to check for rounding errors.***
5. Click **OK**.

Note: If you make any changes to the detailed budget after creating the modular budget, you must return to the modular budget window and click **Sync** to refresh the window.

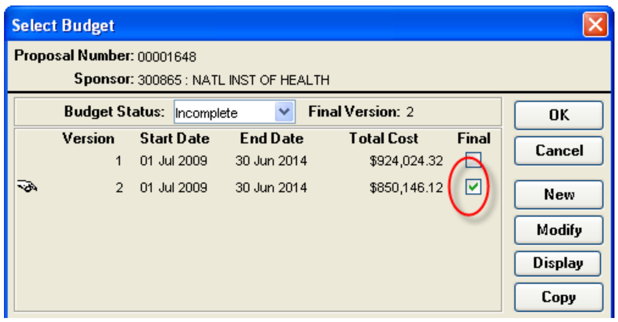
Finalizing the Budget

One version of the budget must be marked **Final** and **Complete** before the proposal is submitted for approval. This is the only version that will be submitted to the sponsor.

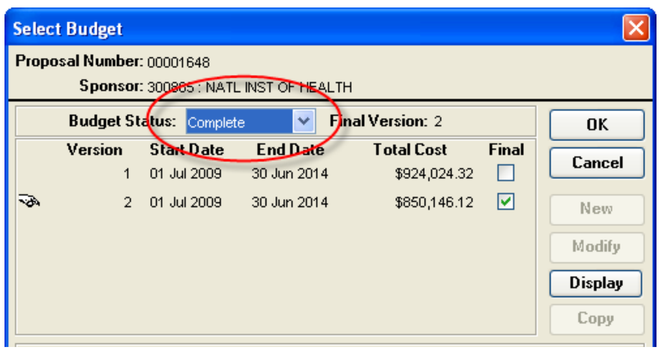
You can finalize the version on the Select Budget window list or on the version's Summary tab.

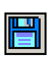
From the Select Budget Window

1. Select the **Final** checkbox for the version. This message displays: "You are modifying the final version status. Are you sure?"



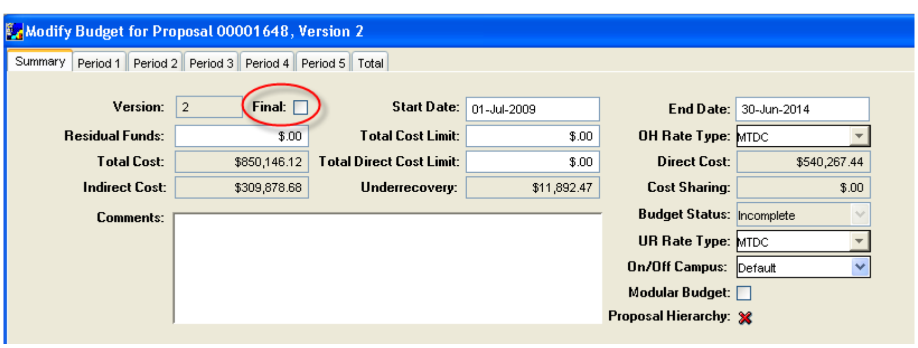
2. Click **Yes**.
3. In the **Budget Status** field, select **Complete** from the drop-down list.



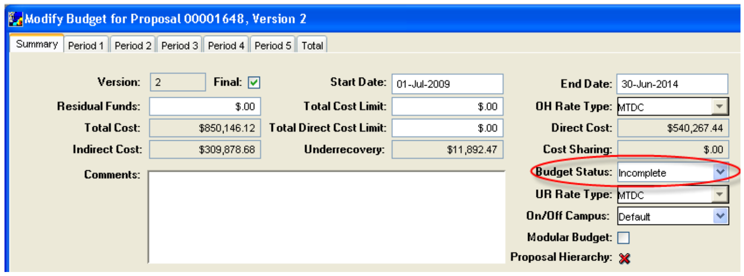
4. Click **OK**.
5. Click the **Save** icon .

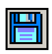
From the Budget Summary Tab

1. Open the Summary tab of the selected version.



2. Select the **Final** checkbox. This message displays: “You are designating a new final version. Are you sure?”
3. Click **Yes**.
4. In the **Budget Status** field, select **Complete** from the drop-down list.



5. Click the **Save** icon .

Narrative Module

Narrative modules are placeholders for documents that are created outside of Coeus and are required for most submissions. Users upload documents into narrative modules in Coeus.

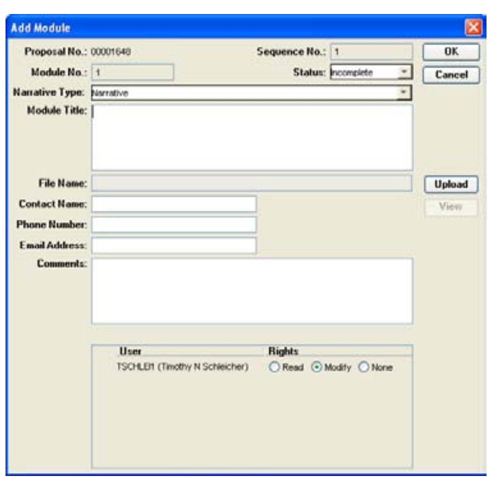
It is ***critical that Narratives have unique titles, devoid of special characters***, especially if they are of a type that allows multiples.

Special characters include spaces, as well as characters such as

” “ , / , \ , () , * , & , ^ , > , % , $, # , ! , and @.

Adding the Narrative Module (Placeholder)

1. Prepare the document outside of Coeus.
2. From the Proposal Details screen click the **Proposal Narrative** icon .
3. Click the **Add Module** icon .



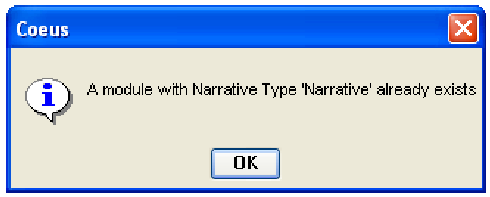
4. Supply the details for the narrative module:

   a. Select the **Narrative Type** from the drop-down list

      A base list of types will always be presented, including any Institutional-only types maintained by your Coeus Administrator to support local business practices.

      For Grants.Gov submissions, the types in the drop-down list are filtered to display the available types to support the forms utilized by the Grants.Gov opportunity selected.

      Most types can be used only once. If you select a **Narrative Type** that can be used only once and that has already been used, this message displays:

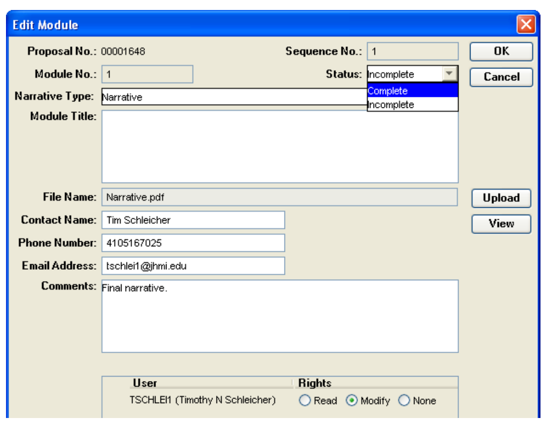


   b. The **Module Title** field is ***required*** if the **Narrative Type** is one that can be used more than once.

   c. You can control which users are allowed to modify or read the narrative file. Specify each user's access rights in the pane on the bottom of the Add Module window.

Uploading Narrative Documents into the Module

1. From the Module window, click on the **Upload** icon. 



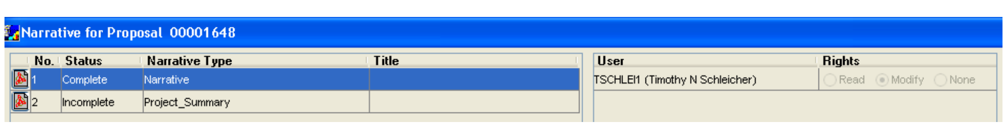
2. In the browser window, navigate to your file and select **Open**. The focus returns to the Module window.

   a. Change the status to complete using the drop-down option in the **Status** field, if appropriate.

   b. Leave the **Status** field at ***Incomplete*** if the file is still in draft mode. While a proposal may begin the routing process prior to having all narratives marked complete, the status must be set to ***Complete*** before the proposal can be submitted to a sponsor.

   c. Click **OK**.

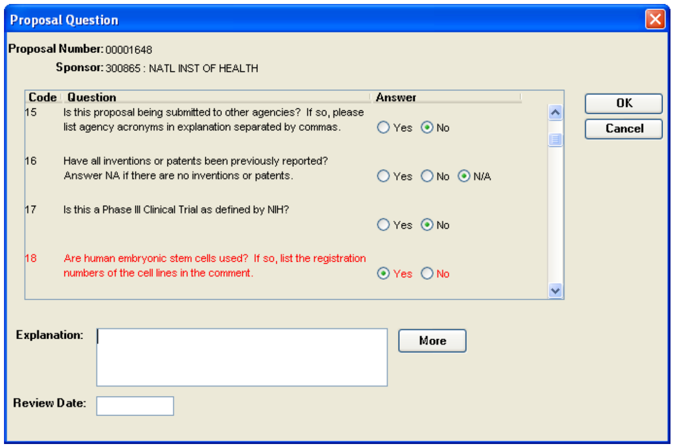
   d. An attachment icon will be displayed beside the module identifying the upload.



YES/NO QUESTIONS

Answers to these compliance questions are required by Johns Hopkins, the sponsor, or both.

1. From the PROPOSAL DETAILS screen click the **Yes No Questions** icon .



2. Click the appropriate answer for each question.
3. When finished, click **OK**.

RESEARCH COMPLIANCE QUESTIONNAIRE

The Coeus Questionnaire contains research compliance questions replacing the eIS. In addition, Coeus adds other questionnaire sets based on the activity type provided in the proposal summary tab.

Answers to the research compliance questions are required by Johns Hopkins.

1. From the menu select **Edit > Questionnaire.**
2. Select the Research Compliance Questions.
3. Complete each of the questions, using the Save and Continue or Go Back buttons, and then choose the Close icon .
4. Click the **Save** icon .

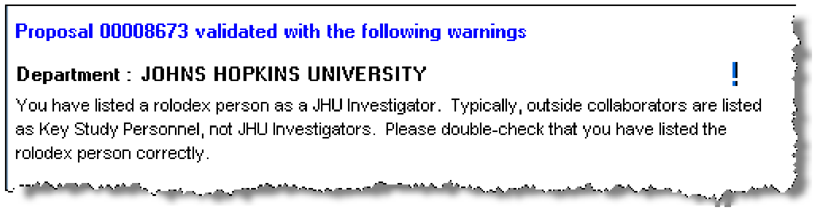
VALIDATIONS

VALIDATING THE PROPOSAL WITH COEUS

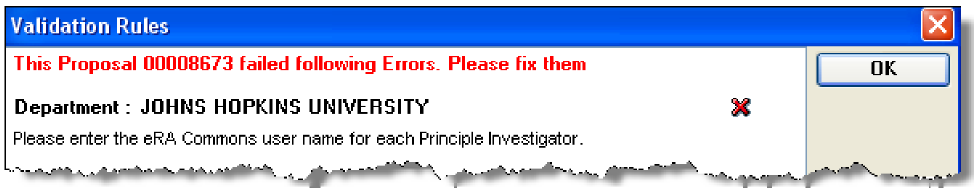
Validations check for completion of Institutional requirements and certain sponsor requirements.

1. Select **Action > Validation Checks**.
2. The Institutional validation check runs and opens the VALIDATION RULES window, which lists items that must be addressed before the proposal can be submitted.

3. ***Validated with warnings****:* provides a notice for you to review and perhaps revise your application prior to submitting to route for approval.



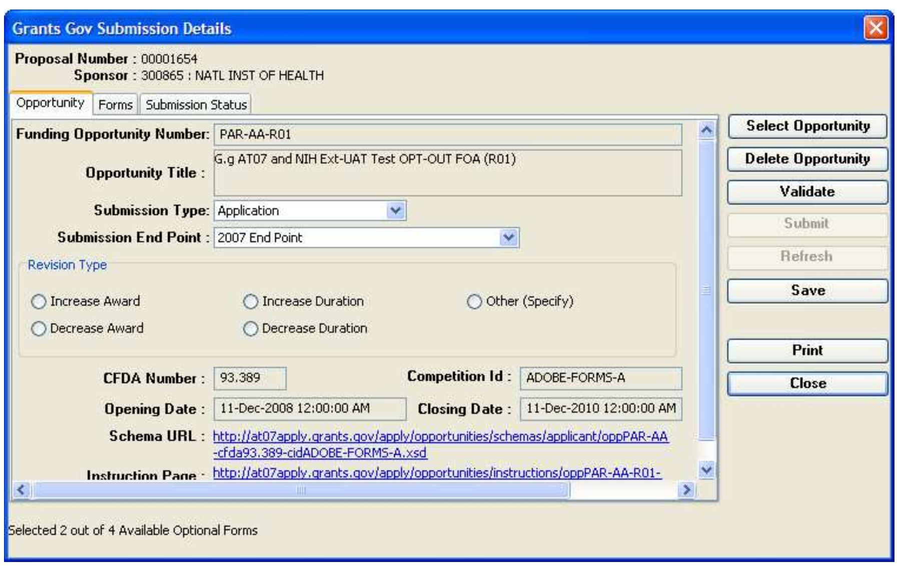
4. ***Validation returning errors***: the proposal cannot be submitted approval routing until the situation causing the failure is remedied.



VALIDATING THE PROPOSAL WITH GRANTS.GOV

This validation determines if all elements required by the sponsor for this announcement have been completed.

1. From the PROPOSAL DETAILS screen, select **Action > Grants.Gov**.

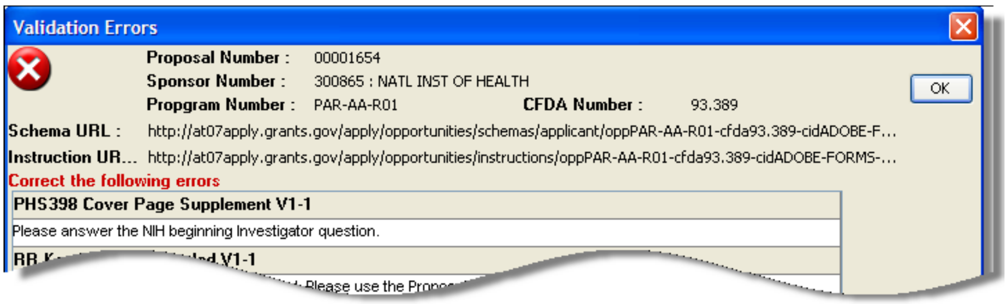


2. Click **Validate**.

3. The result is one of these:

   - The message "Validation Successful" displays. Close the GRANTS GOV SUBMISSION DETAILS window and continue preparing the proposal.

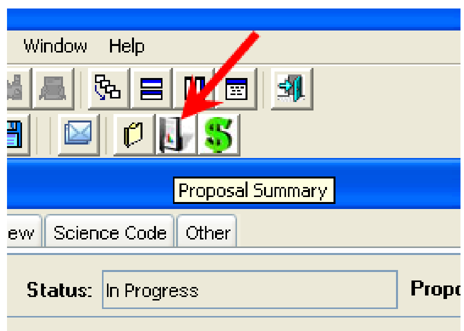
   - A list of items to correct is displayed. Review this list, close the GRANTS GOV SUBMISSION DETAILS window, make the appropriate corrections, and repeat the validation.



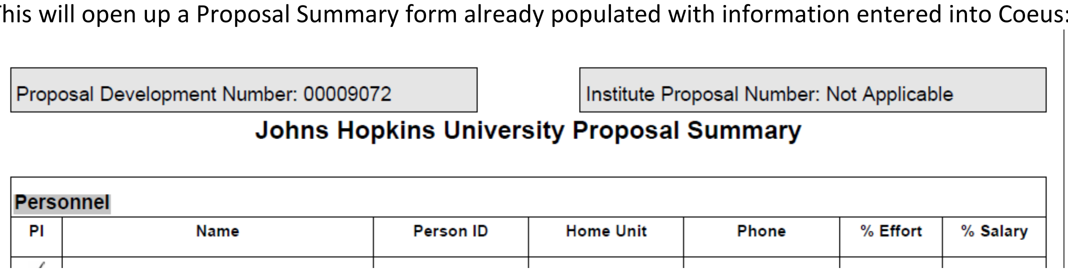
Printing the Proposal Summary (eIS-like form)

To print a Proposal Summary of a Proposal Development or Institute Proposal record:

Click on the Proposal Summary icon on the second row of icons. 



This will open up a Proposal Summary form already populated with information entered into Coeus:

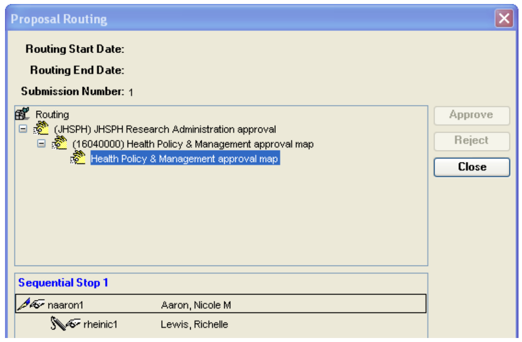


Submitting the Proposal for Approval

Show Routing Map

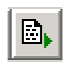
To view the approval routing map in advance of submitting for approval routing:

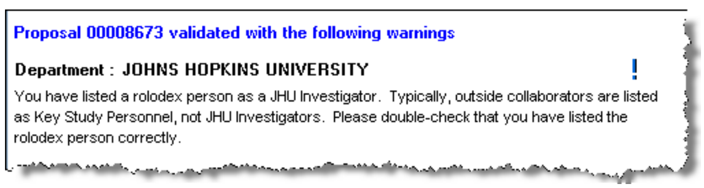
1. Select **Action > Show Routing**.



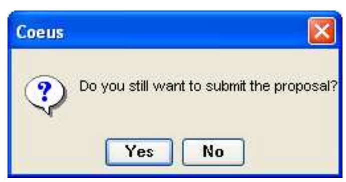
2. Select each level in the displayed Routing Hierarchy to view the approvers maintained at each stop.
3. Select **Close** to close the window.

Submit for Approvals

1. Select the **Submit Proposal for approval** icon .
2. Coeus Validations will be performed, regardless of whether you've manually validated the proposal. Click **OK.**

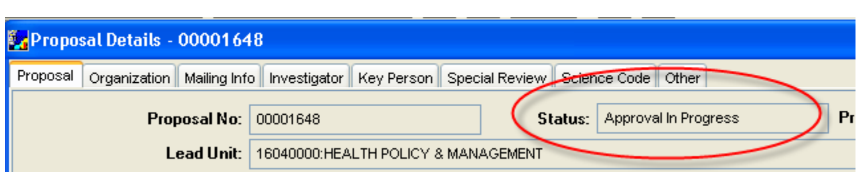


3. Select **Yes** to submit the proposal. Select **No** to close the prompt and cancel submittal until you've performed any necessary validation prompts or until you are ready.



4. If you selected **Yes**, a confirmation message opens confirming successful submittal.

5. Click **OK** to close the prompt. The PROPOSAL ROUTING window opens for information only.
6. Click **Close** in the PROPOSAL ROUTING window.
7. The proposal status is set to Approval in Progress.



Coeus uses your JHED ID and JHED password to authenticate, however you must first have an active Coeus User Account. Coeus Users Accounts are currently maintained by ORIS. To request a Coeus user account, or anytime you need assistance with Coeus, please email coeus-help@jhu.edu.

For Coeus Premium

Step 1: Install Java ***(MAC users jump to step 2 or 3)***:

The Coeus system requires a specific version of Java to be installed on your computer. The PC version of Java that Coeus requires may be downloaded from:

http://resource.ca.jhu.edu/resource/plugin/jre1_5_0_17.exe

Note - you may be asked to restart your computer, so be sure to save any open documents you are working on.

Also, you may not have privileges to install software on your computer, so you may need your LAN administrator to do this step for you.

Step 2: Run JHConnect if you are working outside of the Johns Hopkins University and Johns Hopkins Medicine firewalls.

Coeus is protected behind the Johns Hopkins University and Johns Hopkins Medicine firewall. To access Coeus from outside of the firewall (i.e. working from home), you must first create a VPN session using JHConnect. The JHConnect software may be obtained from the following url:

https://portalcontent.johnshopkins.edu/sslvpn/intro.html

Step 3: Install Coeus Premium Desktop application:

Assuming you are accessing Coeus from your office or via a VPN session, and once you have the correct version of Java, you may access Coeus from the following URL:

https://prcoeus.johnshopkins.edu/coeus/coeus.jnlp

MAC users may need to use this URL:

http://prcoeus.johnshopkins.edu/coeus/coeuss.jnlp (the extra “s” is intentional)

Coeus will check your computer to see if you have the correct version of Java, then check for any previous versions of Coeus. It will then run the Java web Start installer: ***this may take a minute or two.***

a) You will receive a Security warning...
b) Select Start
c) You will then be asked about Desktop Integration:
We recommend answering “Yes.” (this puts a Coeus icon on your desktop after you’ve logged in the first time, so in the future, all you have to do is double-click the icon to launch the Coeus system).

For CoeusLite

Open your web-browser and enter:

https://prcoeus.johnshopkins.edu/coeus

NOTE: To use the TRAINING client, follow the above steps, changing the “pr” to “tr”: for example: https://trcoeus.johnshopkins.edu/coeus/coeus.jnlp.