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The Connection between Coeus proposals & Prime Financials awards and subawards

Background

Coeus is the software that Princeton uses for developing and tracking externally sponsored research proposals. Up until Prime go-live on 7/1/2014, award and subaward information was also housed in Coeus and fed to PS Financials. Since Prime go-live, award and subaward information is housed directly in PeopleSoft (PS) Financials. Data in the Coeus award and subaward modules was frozen as of mid-June 2014.

Coeus is composed of many modules. Users build proposals in the Coeus Proposal Development module with its own tracking ID. Once submitted and fully approved, Coeus automatically generates an Institute Proposal with another tracking ID. Proposals are finalized and electronically approved through Coeus before they are sent to the sponsor. Once funded, the proposal information is interfaced by ORPA Award Specialists to PeopleSoft Financials (PS Financials), where the award data is maintained. Subawards are also tracked in PS Financials.

Coeus was originally developed at MIT. There are ~50 schools around the country that use at least one Coeus module. Coeus is the Greek Titan of intelligence, and is not an acronym. Princeton started using Coeus in 1998 in ORPA, and then had a dept-by-dept rollout of the software in 2002.

Before and After Prime

Pre-Prime (prior to 7/1/14)

- Coeus was used for tracking proposals, institute proposals, awards & subawards
- Basic award and award budget data fed from Coeus to PS Financials 8.4 nightly
- The expenditures were tracked in PeopleSoft 8.4
- Depts had direct access to view Coeus award and subaward data
- Depts had IW access to view reports comparing Coeus award budget to PS expenditures (SPR)

Post-Prime (after 7/1/2014)

- Coeus is still used for proposal tracking, but is not used for tracking awards or subawards
- Coeus award and subaward modules were frozen as of mid-June 2014
- PS Financials 9.2 is used for tracking awards and subawards
- No direct dept access to PS Financials
- Depts view PS award and subaward data via IW reporting. IW reports contain one-day old data (except the NOA which is real time.) Fill out the Prime Access Request Form and submit it to the Financial Services Center to gain access to Prime award and subaward info.
- Directions on how to fill out the Prime Access Request Form are here.

Coeus is Prime-enabled. What does that mean?

- Most pre-Prime Coeus cost elements were inactivated, and many new Prime budget items were added. We didn’t inactivate all Coeus cost elements because we still need some of them for s2s, so that they map to the appropriate place on the Grants.gov detailed budget form. A chart is available in the budget section of this manual that shows the old Coeus cost elements and new PS budget items (i.e. BPG201 “Faculty Salaries” is now SALRF “Salary - Regular Faculty”).
- Any proposal submitted and approved before Prime go-live will still display the cost elements that were used at time of submission.
• If you copy an old proposal where the pre-Prime cost elements were used, Coeus will force you to replace all of the inactive pre-Prime elements with active cost elements.
• The pre-Prime 3 digit dept numbers displayed throughout Coeus were replaced by the post-Prime 5 digit dept number at the main level ("00 level") for each dept.
• The PG numbers displayed throughout Coeus were not replaced.
• For any new awards set up in Prime, the PeopleSoft Award number will feed back to the Account Number box in the Coeus Institute Proposal module.
• If you had modify access to the Coeus award, award budget and/or subaward modules, your access is now view only.
• If you have view only access to the Coeus award, award budget and/or subaward modules, your access remains as view only.

What was converted from Coeus to PS Financials?

• Awards active in FY14 and any closed children associated with those awards were converted from Coeus to PS Financials, but not all award info was converted
• Active subawards in FY14 were converted

What was not converted from Coeus to PS Financials for existing awards?

• The history of every increment and budget
  o The current cumulative amounts (obligated dollars, dates and budget) were converted
  o Anticipated totals and end dates were converted
• All comments on the Comments tab were not converted
• All attachments on the Attachments tab were not converted
• Not every term was converted (terms were condensed at conversion)
• Payment schedule was not converted
• All Institute Proposal numbers funding the award were not converted
  o Only the initial IP number was converted
• Cost share commitments were not converted. We will reach out to you for your cost shared awards.
• You can still view all the data above in the Coeus award and award budget modules, as appropriate.

What was not converted from Coeus to PS Financials for existing subawards?

• Subaward Purchase Orders for closed subawards were not converted
  o PO number for closed subawards will not appear on the NOA
• Subaward invoices approved in Coeus prior to 6/20/14 will remain in Coeus
  o Not converted to PeopleSoft
  o Do not appear on the Subaward Detail Report and Invoice Drill
• You can still view all the data above in the Coeus subaward module.
Awards and subawards post-Prime quick guide links

The current award and subaward info is in PS Financials. You can access that information through the Information Warehouse (IW), which contains one-day old data (except the NOA, which is the only real-time IW report). Fill out the Prime Access Request Form and submit it to the Financial Services Center to gain access to Prime award and subaward info. Directions on how to fill out that form are here.

More information about award and subawards in the post-Prime era is available on this page and includes the following info:

- Use the Award Quick Guide to learn about:
  - The new Prime award structure
  - How to find obligated/anticipated dates/dollars on sponsored research reports
  - What the different award/project/activity statuses are and what they mean
  - How to view award and subaward attachments
- Read the Converted Award Quick Guide to find out:
  - How awards were converted from Coeus to PS
  - What data was not converted from Coeus to PS
  - How the Prime award structure differs from the Coeus award hierarchy
- The Requesting Access to Sponsored Research Reports Guide includes:
  - Definitions of the various Sponsored Research Reporting Access roles
  - Who has default access to Projects
  - How to fill out the Prime Financials Access Request form for sponsored research access.
- The Subaward Invoice Approval Quick Guide is:
  - A one-page guide on how to approve subaward invoices in Prime.
- The Viewing Award and Subaward Attachments Guide shows:
  - How to view award and subaward documents in Prime.
  - Troubleshooting instructions for when attachments don’t want to open

Terms and Definitions

Princeton Prime

Princeton Prime is a broad term that encompasses many different systems, such as:

- Concur
- LA
- Marketplace
- Information Warehouse (IW)
- PeopleSoft Financials (PS)

There are several modules within PS Financials. Sponsored research awards are entered into PS Grants by ORPA Award Specialists.

Information Warehouse (IW) and Cognos

Reporting is done out of the Information Warehouse (IW). IBM Cognos is the software the IW uses for reporting.
**Unit and Dept**

Coeus refers to department numbers as “units”. This is because Coeus was developed at MIT and at MIT, departments are called units. In Coeus, units and departments are the same thing.

- Some depts have their sponsored research at the main dept (APC, GEO)
- Some depts have a research subdept (MOL)
- Some depts have subdepts for particular professors, but not all (CHM)
- Some depts have centers, many having research (WWS)

Regardless, all Coeus proposals are created and submitted at the dept’s “main level” (“ends in 00” level). When awarded, the dept determines the appropriate subdept, as applicable.

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**Introduction to Coeus Proposal Development**

**Who Should Read This**

The *Proposal Development User Guide* for Coeus is intended for users who create, modify, or approve proposals.

**Coeus Proposal Development Data Entry**

Proposal Development data entry into Coeus can be divided into four steps:

- **Proposal Detail Entry**: Enter the basic details of your proposal.
- **Narrative Upload**: Upload documents such as the narrative, project summary, facilities, equipment, bibliography, etc.
- **Budget Creation**: Create the budget (or multiple budget versions).
- **Finalize & Submit for Approval**: Finalize your proposal, which includes answering the Yes/No Questions and certifying the investigators. Then, submit the proposal for approval routing.

**The Proposal Process**

The proposal flows through Coeus and into PS Financials as follows:

- **Coeus institute proposal module** (auto generated after ORPA approval)
- **PS Financials** (If awarded, proposal data is interfaced from Coeus to PS Financials and maintained by ORPA)
In detail:

**PI has an idea and wants to apply for funding from a sponsor**
PI writes a proposal that includes: Why should the sponsor choose them? What will they do? What is their budget? What is their budget justification?

The dept person enters the proposal in the Coeus Proposal Development module and in the sponsor's forms. The proposal's status is "in progress".
Once the department submits the proposal for approval, its status is "approval in progress".

Dept and collaborating departments approve/reject proposal in Coeus.
If it is rejected, the proposal status is "rejected". The dept makes changes and submits through the approval map again. The proposal status is then "approval in progress".

After all departments approve, the proposal is reviewed by ORPA in Coeus. If ORPA rejects the proposal, the dept makes changes & submits through the entire approval map again.
If ORPA approves, an Institute Proposal (IP) is generated. The proposal status is Submitted* and the IP status is pending. The proposal is submitted to the sponsor.
(*If the proposal meets criteria for University Research Board (URB) review, the status is "post-submission approval." When the URB approves, the status is Submitted.)

Wait to hear from the sponsor.
If the proposal is declined, ORPA updates the IP status to "Declined."
If the proposal is funded, ORPA interfaces the proposal information from Coeus to PS Financials. The PS Award ID then interfaces at 5am the next morning back to the Coeus IP module, which also flips the IP status to Funded at the same time.
If the award contains subcontracts, ORPA will enter approved subaward initiation requests into PS Financials.
Accessing Coeus

Requesting Coeus Access

The new user’s dept, business, finance, or grant manager should fill out the Coeus new user request form on the Coeus Forms page and email it to coeus_help@princeton.edu.

Coeus Premium vs Coeus Lite

There are two versions of Coeus: Premium and Lite.

- Coeus Premium is used by departments for developing and submitting proposal development proposals, and can be used by departmental approvers for approving proposals on their computers.
- Coeus Lite is used by departments and departmental Chairs for approving proposals on computers, tablets or smart phones.

Launching Coeus / Desktop Icon Issues

Launch Coeus Premium or Lite from the Coeus home page.

Coeus Premium will create a desktop icon for you that you can use to launch Coeus. However, sometimes the icon stops working for no reason at all. You can either remove the icon and only use the link on the Coeus home page to launch Coeus (similar to launching Prime—there is no desktop icon for Prime), or you can follow the instructions in the Installation and Troubleshooting Guide to fix the desktop icon issue.

Logging on

Your login for both Coeus Premium and CoeusLite is your LDAP login. This is the same user name and password you use to log onto your Princeton computer and check your Princeton email.

If a Coeus Message screen appears after you log on, either click on ok or check the box to not see that message again (it will most likely not appear again).

If you have trouble logging on to Coeus, call the Coeus Hotline at 8-7373 or email coeus_help@princeton.edu.

Coeus and Java

Coeus requires Java 1.8 to run. More information about Java, and associated quirks with Java 1.8 on PCs and on Macs, is in the Installation and Troubleshooting Guide on the Coeus home page.
Logging Out

Coeus Daily Reboot Schedule

The Coeus production server is rebooted every morning at 5am. The reboot takes approximately 2 minutes, so Coeus will be down for that period of time daily.

Navigating through Coeus

All Coeus features can be accessed by either menus or toolbars interchangeably.

Toolbars

When you first launch Coeus, one toolbar is displayed. This toolbar applies to the application as a whole.

To display the names of the toolbar buttons, hover the cursor over the button for a few seconds. The name of the button will appear.
A second row of toolbar buttons is displayed when you open a module. The second toolbar applies to the module you're working in.

A toolbar guide is available on the Coeus home page that explains the functionality of each button.

Buttons may be grayed out if you don't have rights.

**Moving Between Windows**

As you work in Coeus, windows open on top of other windows. If you don’t want to close your currently open windows, use the Window menu to see a list of open windows. Click on the one you want to see.

Click on the Cascade button to fan all of your open windows like a deck of cards.
Click on the Layer button to layer your windows again.
Searching in Coeus

Using the Search Window

The search window is displayed when you click on any module in the first toolbar.

The query will be applied to only those proposals where the current user, KBURKHAR plays one of the selected proposal roles.

Selected Roles

Available Roles

When you're already in a module, you can click on the search icon in the second toolbar to search again.

(You don't need to close the module and reopen it to access the search button again)
**Entering Search Values in Fields**

The * wildcard is your friend with Coeus searching. Use the * to:

- Take the place of zeros in proposal number searches
  - *12345 instead of 00012345
- Take the place of a person's full name
  - sarm* instead of Sarmiento
- Find a proposal by a word in the title
  - *microscope* to find The History of the Microscope in New Jersey
- Find a sponsor name using part of their name
  - *science* to find National Science Foundation

When searching in text fields, you can type part of the word you are searching for, surrounded by stars. For example, if you are searching for all proposals where McGill is a PI, you can type *mcgill* in the `Investigator` field to locate all proposals which contain McGill. (Text searching is not case sensitive.)

<table>
<thead>
<tr>
<th>Operator</th>
<th>Use to Locate</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>All values that include the text that follows the * wildcard symbol. You can use the wildcard * at the beginning or end of a text string, to indicate that there may be any number of characters before or after the text. The search is not case sensitive.</td>
<td>McGill* in the <code>Investigator</code> field will find McGillicuddy, John, but not Walters, Gillian. <em>Gilli</em> will find McGillicuddy, John, or Walters, Gillian.</td>
</tr>
<tr>
<td>No operator</td>
<td>All values that equal the text entered in the search field. Wildcards will be treated as text.</td>
<td>23300 in the <code>Unit Number</code> field will find only department 23300.</td>
</tr>
<tr>
<td>&lt;</td>
<td>All values that are less than the value that follows.</td>
<td>&lt; 00025300 in the <code>Proposal No</code> field will find 00020000, but not 40100000 or 140</td>
</tr>
<tr>
<td>&gt;</td>
<td>All values that are greater than the value that follows.</td>
<td>&gt; 00020000 in the <code>Proposal No</code> will find 00024000, but not 00000200 or 00000040</td>
</tr>
<tr>
<td>&lt;=</td>
<td>All values that are less than or equal to the value that follows.</td>
<td>&lt;= 00030000 in the <code>Proposal No</code> field will find 00030000, 00029900, but not 300</td>
</tr>
<tr>
<td>&gt;=</td>
<td>All values that are greater than or equal to the value that follows.</td>
<td>&gt;= 00030000 in the <code>Proposal No</code> field will find 00030000, but not 00029900</td>
</tr>
</tbody>
</table>
Full Name Searching

Coeus stores full names as:

**Last, First Middle Initial**

**Sarmiento, Jorge L**

The above shows all the different ways of searching for Jorge Sarmiento in the Investigator box in the Coeus Proposal Development and Institute Proposal screens. Depending on your investigator’s name, you can figure out the fastest way of finding his/her name in the fewest characters possible.
First and Last name searching

Here are all the different ways to search for Jorge Sarmiento when the First and Last Name fields are separate fields in Coeus.

NOTE: If the search results returns proposals that do not list Jorge Sarmiento in the PI column, that is because Sarmiento is a co-PI on the proposal. The search results field shows the lead PI for the proposal.
Searching by proposal number

Use the wildcard * in place of the three zeros in front of the proposal number to more quickly find your proposals. I like using the * over the numeric keypad on my keyboard to search really quickly.

Title Searching

<table>
<thead>
<tr>
<th>Title</th>
<th>Search</th>
<th>Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begins with</td>
<td>study*</td>
<td>Study of Molecular ....</td>
</tr>
<tr>
<td>Ends in</td>
<td>*study</td>
<td>…A Longitudinal Study</td>
</tr>
<tr>
<td>Contains</td>
<td><em>study</em></td>
<td>Study of Molecular ....</td>
</tr>
<tr>
<td></td>
<td></td>
<td>…A Longitudinal Study</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Summer Study of Delicious Fruit</td>
</tr>
</tbody>
</table>

Using the wildcard * before and after search terms will return the most number of results. This kind of searching works for any text searching in Coeus.

Using Multiple Lines to Expand the Search

You can use more than one line in the search screen at one time. For example, you can look up two proposals at the same time.
NOTE: If you enter a search term (such as a number) on the first line of the search screen for the Proposal Development, Institute Proposal, Award and Subcontract modules, then want to enter a second number in the next row, you have to press the down arrow twice to get the cursor to go to the second line. This problem only happens on the first line of the search screen. Or, you can click into the next row instead of using the down arrow.

Search Results Order

For the Proposal Development and Institute Proposal modules: When a search returns more than one search result, the proposals will be listed in reverse numerical order, so recent proposals will be listed first.
While testing P2, we found that sometimes, after editing a proposal and closing it, the proposal was listed twice in the Proposal Development list screen. In the example below, the proposal number is the same. The PI is listed on one row but not the other. It appears to just be a screen display issue. There is only one version of the proposal and you can select either line for editing.