Coeus Info & Searching Quick Guide
(Last Revised April 2016)

What is Coeus? How was Coeus used pre- and post-Prime?
- Currently, Coeus is the software Princeton uses for tracking external sponsored research proposals.
- PeopleSoft (PS) Financials is used for tracking awards and subawards.
- Pre-Prime, Coeus was used for tracking & maintaining proposals, awards and subawards. Some Coeus award & award budget data fed to PS.
- Coeus award and subaward info was frozen as of mid-June 2014.
- Use the Information Warehouse (IW) to find current info about awards and subawards. Quick guides regarding requesting IW access and how to look up current award and subaward information are here.

How does data flow through Coeus into PS Financials?
- Department administrators enter proposals into the Coeus Proposal Development (PD) module, which are automatically assigned an 8-digit tracking ID with a terminal status of Submitted.
- Once approved by all depts involved and by ORPA, Coeus automatically generates an Institute Proposal (IP) number (an 8-digit tracking ID that is different from the PD number) with status of Pending.
- If the sponsor declines the proposal, ORPA updates the IP status to Declined.
- If the sponsor funds the proposal, ORPA Award Specialists interface the proposal from Coeus to PS Financials and set up the award in PS. The next morning, the PS Award number interfaces back to the Coeus IP and changes the IP status to Funded.

Requesting Coeus access
- Have your dept, grant, finance or business manager fill out the Coeus new user request form and email it to coeus_help@princeton.edu. Access is typically granted the same day.

Two versions: Premium and Lite
- Coeus Lite is mainly used for approving proposals on mobile devices.
- Coeus Premium is used for entering proposal data and searching for data. Premium requires Java and a computer.

Launching and Logging onto Coeus Premium
- Click on the “Launch Coeus Premium” link on the Princeton Coeus page
- Enter your LDAP user name and password in the Logon box & click OK.

Frequently used icons
Coeus has many toolbar icons. The first toolbar applies to the application as a whole. The second toolbar applies to the module you selected. Hover the mouse over an icon to see the icon’s description.

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Searching
- Click on the icon for the appropriate module (in this example, the proposal development module.) The search window for that module opens.
- Search by ID number, status, PI name, title and more.
- Searches can be combined on one row (for example, searching for all Institute Proposals by a particular PI that are status Pending)
- Use the * for wildcard searching with names or titles (i.e. *energy* to find titles containing the word energy, or cava* to find all of Cava’s proposals)
- Use the * to replace the leading zeros in proposal numbers, i.e. *23456 instead of 00023456
- Press Find and the search results list will appear.
- Click on a column header to sort by that header.
- Double click on any search result to view it.
- Press the Save icon in the second toolbar to save the results in an Excel spreadsheet.
How do you know if the number you have is the Coeus Proposal Development (PD) or Institute Proposal (IP) number?

As of March 2016, the latest PD numbers are in the 00022000 and less range, and the latest IP numbers are in the 00029700 and less range.

Viewing the proposal budget when you have the Coeus Proposal Development (PD) number

Click on Display. The final budget version will appear. View summary information on the Summary tab, cost element information for each budget period on the Period 1, 2, etc tabs, and view Total information by period on the Total tab.

Click the yellow folder icon to close the budget. Then continue clicking on the yellow folder icon on each screen until you have closed all windows. Use the red X in the upper right corner to close Coeus.

Viewing proposal attachments (narratives) when you have the Coeus Proposal Development (PD) number

Continue clicking on the yellow folder icon on each screen until you have closed all windows, then use the red X in the upper right corner to close Coeus.
Viewing proposal attachments (narratives) when you have the Coeus Institute Proposal (IP) number

Continue clicking on the yellow folder icon on each screen until you have closed all windows, then use the red X in the upper right corner to close Coeus.
Viewing proposal attachments (narratives) when you have the PS Award Number

PeopleSoft award numbers start with AWD (any award funded added after Prime go-live on 7/1/14) or CNV (awards that were funded in Coeus and then converted to PS). If you have the PS award number and need to view the Coeus narrative:

1. Enter the PS award number in the Account Number box.
2. Press Find.
3. Click on Medusa.
4. Click View.
5. Click the yellow folder icon on each screen until you have closed all windows, then use the red X in the upper right corner to close Coeus.

Now you are viewing the Coeus Proposal Development (PD) proposal. Click on the Narrative button.

You might see one row or many rows. Click on an icon once to view the file.

What if there is more than one row of "colorful building blocks" icon? This means there were resubmissions, revisions or renewals linked to one IP #. Start with the one on the bottom (last one).
Viewing the sponsor’s status (Pending, Declined, Funded/Already Awarded) when you have the Coeus Proposal Development number

You have the Coeus Proposal Development (PD) number and want to know if the proposal is Funded (or Already Awarded) by the sponsor, Declined by the sponsor, or still Pending the sponsor’s decision.

Continue clicking on the yellow folder icon on each screen until you have closed all windows, then use the red X in the upper right corner to close Coeus.

Viewing a list of proposals submitted by a PI or co-PI

NOTE: You may see other investigator’s names in the Investigator box in the search results list. That means the person you searched on is a co-PI on that proposal. Only the lead PI is listed in the search results.

Click on the yellow folder to close.
Finding all proposals submitted to a sponsor

The first step to finding all proposals submitted to a sponsor is to know the Coeus sponsor code number. To find the sponsor code number:

You could put * in the sponsor code box—it will return all sponsors and then you can press the save button in the second toolbar to save the results as an excel spreadsheet, then filter as needed.

Notes:
- Sponsors can be active or inactive, as noted in the Status column.
- When users submit new proposals, they can only select active sponsors.
- Any existing, submitted proposals with inactive sponsors will continue to display the inactive sponsor code.
- Because Coeus sponsor names are fed to PS, and PS has a 40 character limit on sponsor names, you may see sponsor names with abbreviated words. That is why it is better to search on part of the name of the sponsor in stars, and if you can’t find it under one word in the name, try another word in the name, in stars.
- The sponsor code is not unique to an organization—there can be multiple active sponsor codes for one organization if an org has multiple locations.

Once you have the sponsor number, then you can easily search for proposals submitted to that sponsor:

Notes: if the sponsor has multiple locations or had multiple sponsor codes, enter the sponsor codes in the sponsor code column, one row per location.
Viewing a list of proposals submitted by a department

1. Slide the bar to the right.
2. Enter the department’s main level (ends in “00”) number in the Dept Number box.
3. Press Find.

Note: All Coeus proposals are entered at the dept’s main level (ends in “00”) number and not at the subdept level. The subdept is assigned when the proposal is awarded in PS Financials.

Click on the yellow folder to close.

Logging off Coeus

To log off Coeus, click on the red x or the door icon.

Click on the Save button to save the results to Excel.