



# Approving Proposals and Subaward Invoices in CoeusLite 4.4.3

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## About CoeusLite

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CoeusLite can be used to approve or reject proposals and subaward invoices. The Department Administrators and Proposal Approvers can use CoeusLite to review, approve and/or reject proposals. Principal Investigators can use CoeusLite to review, approve, and/or reject subaward invoices.

You will be notified by e-mail that a proposal or invoice requires approval. The e-mail will come from Coeus.Application@princeton.edu, and will include a link to CoeusLite. When you receive an e-mail notification, review the proposal carefully before approving it, making sure that the areas you are responsible for are complete and correct.

You will be required to sign on using your NetID and LDAP password. When you have finished using CoeusLite, you will need to log off.

### ***Who should read this guide?***

This guide is intended for departmental proposal approvers and for PIs who approve subcontracts.

### ***What you can do in CoeusLite***

When you are in CoeusLite, you will be able to

- See a list of the proposals or subawards you need to review.
- For proposals, you can
  - Display the proposal and any narrative files associated with it, as well as the budget report, and the cost share report.
  - Approve or reject a proposal.
  - See the approval routing for the proposal when you approve or reject it.
- For subaward invoices, you can
  - Display the subaward invoice
  - Approve or reject the subaward invoice.

These functions are explained in the following sections.

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## Reviewing, Approving & Rejecting a Proposal

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### Logging in

1. Click on the link in the notification e-mail to display the CoeusLite LDAP Login page where you can sign onto CoeusLite.
2. Type your NetID in the *User Name* field and your LDAP password in the *Password* field, and click the

login button.

### Viewing basic proposal information

1. If you used the link in the email, the proposal page will open directly to the proposal summary page, as shown below. (If the proposal summary screen does not appear as shown below, click on *Inbox*, then click on the title or number of the proposal. The proposal details screen will appear.)
2. Basic summary information, such as the direct costs, indirect costs, total costs, underrecovery, and cost share amounts for the entire period are listed (see box A in the screenshot below).

**Proposal Summary**

Investigator: Petsis, Jeffrey W      Proposal #: 00010966 (Approval In Progress)  
 Agency/Sponsor: 000340 : National Institutes of Health      Proposal Period: 07/01/2011 - 06/30/2016  
 Title: Chocolate Chip Cookie: Great Cookie or Greatest Cookie?

**Budget Summary**

**Budget Total**

Direct Cost: \$2,211,397.40      Indirect Cost: \$1,005,320.65      Total Cost: \$3,216,718.05  
 Under Recovery :\$0.00      Cost Share: \$0.00      Period: 07/01/2011 - 06/30/2016

**Budget Period**

Period	Start Date	End Date	Direct Cost	Indirect Cost	Under Recovery	Cost Sharing	Total Cost
1	07/01/2011	06/30/2012	\$414,277.76	\$185,609.45	\$0.00	\$0.00	\$599,887.21
2	07/01/2012	06/30/2013	\$420,448.89	\$193,033.82	\$0.00	\$0.00	\$613,482.71
3	07/01/2013	06/30/2014	\$437,266.84	\$200,755.17	\$0.00	\$0.00	\$638,022.01
4	07/01/2014	06/30/2015	\$454,757.53	\$208,785.41	\$0.00	\$0.00	\$663,542.94
5	07/01/2015	06/30/2016	\$484,646.38	\$217,136.80	\$0.00	\$0.00	\$701,783.18

**Budget Report**

- [Budget Summary by Period](#)
- [Cost Sharing Summary by Period](#)
- [Cumulative Budget](#)
- [Industrial Budget by Period](#)

**Attachments**

Type	Description	View
Narrative	Complete	View
Facilities	Complete	View
Equipment	Complete	View
Project_Summary	Complete	View
Budget_Justification	Complete	View
PI certification	Complete	View

- To view more detailed budget information, click on the links for the budget summary report, cost sharing report, cumulative budget report, or industrial report (box B in the screenshot above). The report will open in a separate browser window. Please note, the industrial report adds any overhead and employee benefit to the line item and displays the total for that line.



**NOTE:**

- To view detailed **cost sharing** distribution by dept, click on "Proposal Details" > Print > Show > select the forms and press "Print Selected".
- To view **more detailed proposal information** in CoeusLite, see the "viewing detailed proposal information" section of this manual.
- If a budget contains **personnel items with cost sharing**, in some instances that person may not appear in the personnel section of these budget reports and the cost sharing total may be incorrect; see the "viewing detailed proposal information" section of this manual

- If any attachments were uploaded, they can be viewed by clicking on the View link (box C in the screenshot above)
- If you want to view additional detailed information about the proposal, see the "Reviewing Detailed Proposal Information" section in this guide.

## Approving the Proposal

To approve the proposal, click on the Approve link on the left side of the screen. A new screen will appear. If you have any comments to make, you can enter the comments and your name in the comments box. Approval comments are not mandatory. Then press the Approve button. If you didn't mean to press the Approve link, then click on the Back button. You can ignore the Add buttons and the "Add Attachments" section.

The screenshot shows the CoeusLite web interface. At the top, there is a navigation menu with links: Coeus Home, My IRB Protocols, My Proposals, My COI, My IACUC Protocols, Inbox, My ARRA, and Logout. Below the navigation menu, there is a section for proposal details:

Investigator:	Petsis, Jeffrey W	Proposal #:	00010966 (Approval In Progress)
Agency/Sponsor:	000340 : National Institutes of Health	Proposal Period:	07/01/2011 - 06/30/2016
Title:	Chocolate Chip Cookie: Great Cookie or Greatest Cookie?		

Below the proposal details, there is a section for adding comments:

**Add Comments:**  
 Comments:   
 Add

Below the comments section, there is a section for adding attachments:

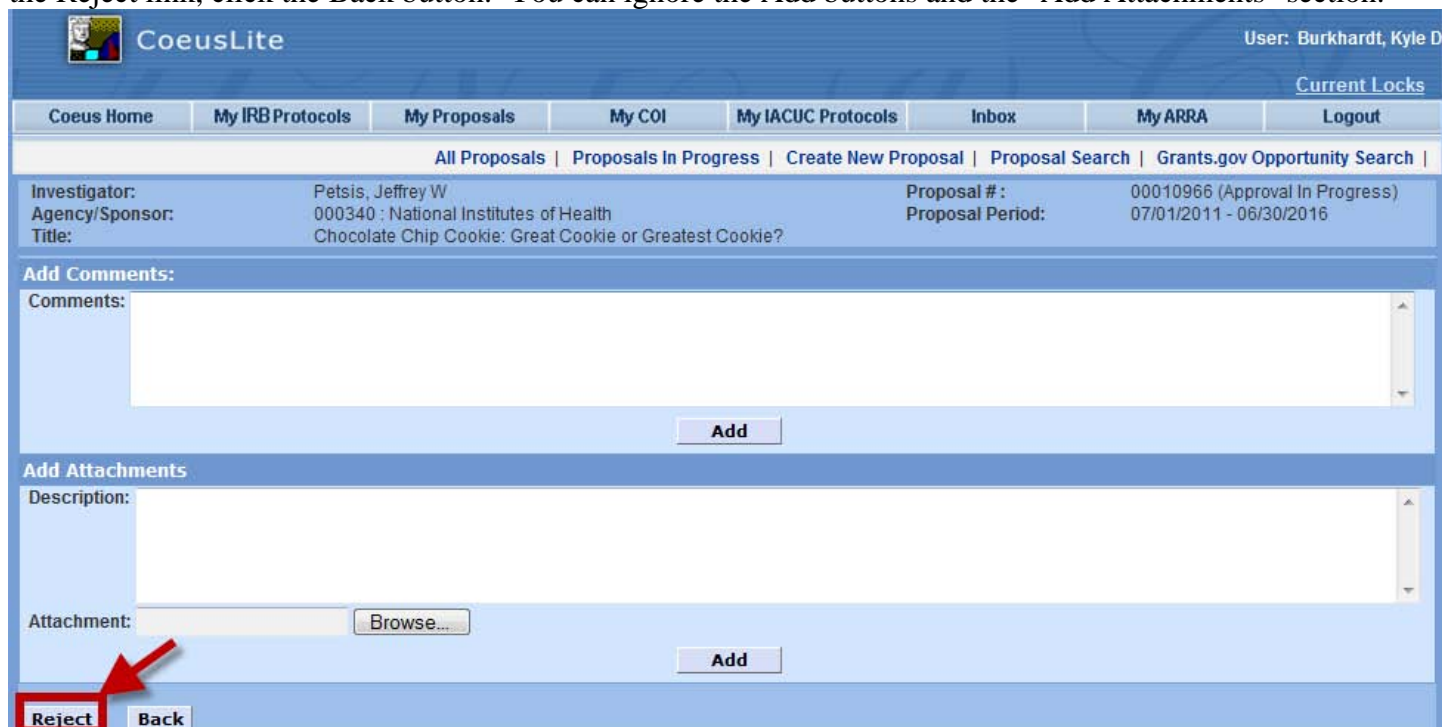
**Add Attachments**  
 Description:   
 Attachment:  Browse...  
 Add

At the bottom left of the interface, there are two buttons: **Approve** and **Back**. A red arrow points to the **Approve** button.

## Rejecting the Proposal

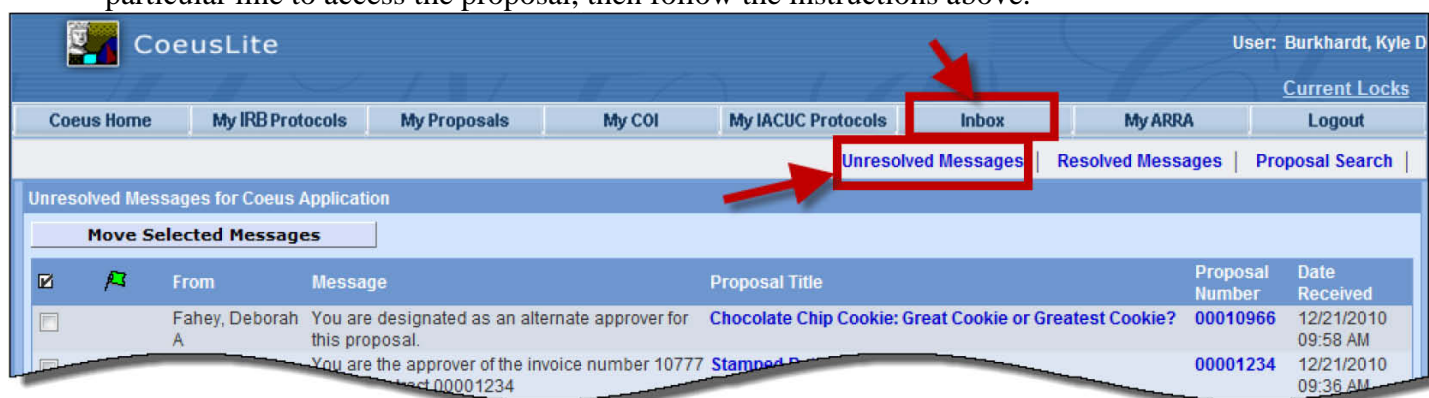
To reject the proposal, click on the Reject link on the left side of the screen. A new screen will appear. Enter the reasons why you are rejecting the proposal and your name in the box, then press the Reject button. If you do not enter comments, CoeusLite will prompt you to enter the rejection comments. If you didn't mean to press

the Reject link, click the Back button. You can ignore the Add buttons and the "Add Attachments" section.



### Reviewing additional proposals in the same session

1. If you have more proposals to approve or reject in the same session (or if you accessed CoeusLite by using the generic CoeusLite URL), you can click on the Inbox button. This will take you to the "Unresolved Messages" that are in your CoeusLite inbox. You can click on the title or number for a particular line to access the proposal, then follow the instructions above.

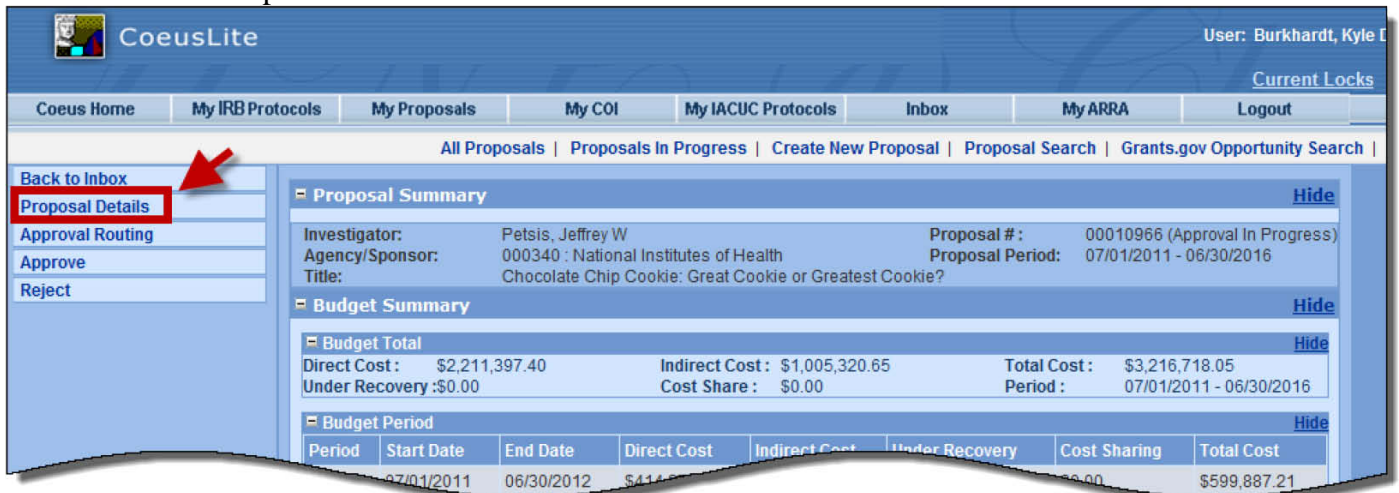


2. Please note that checking the box on the left side of the screen and pressing the "Move Select Messages" button does not mean you are approving the proposal.

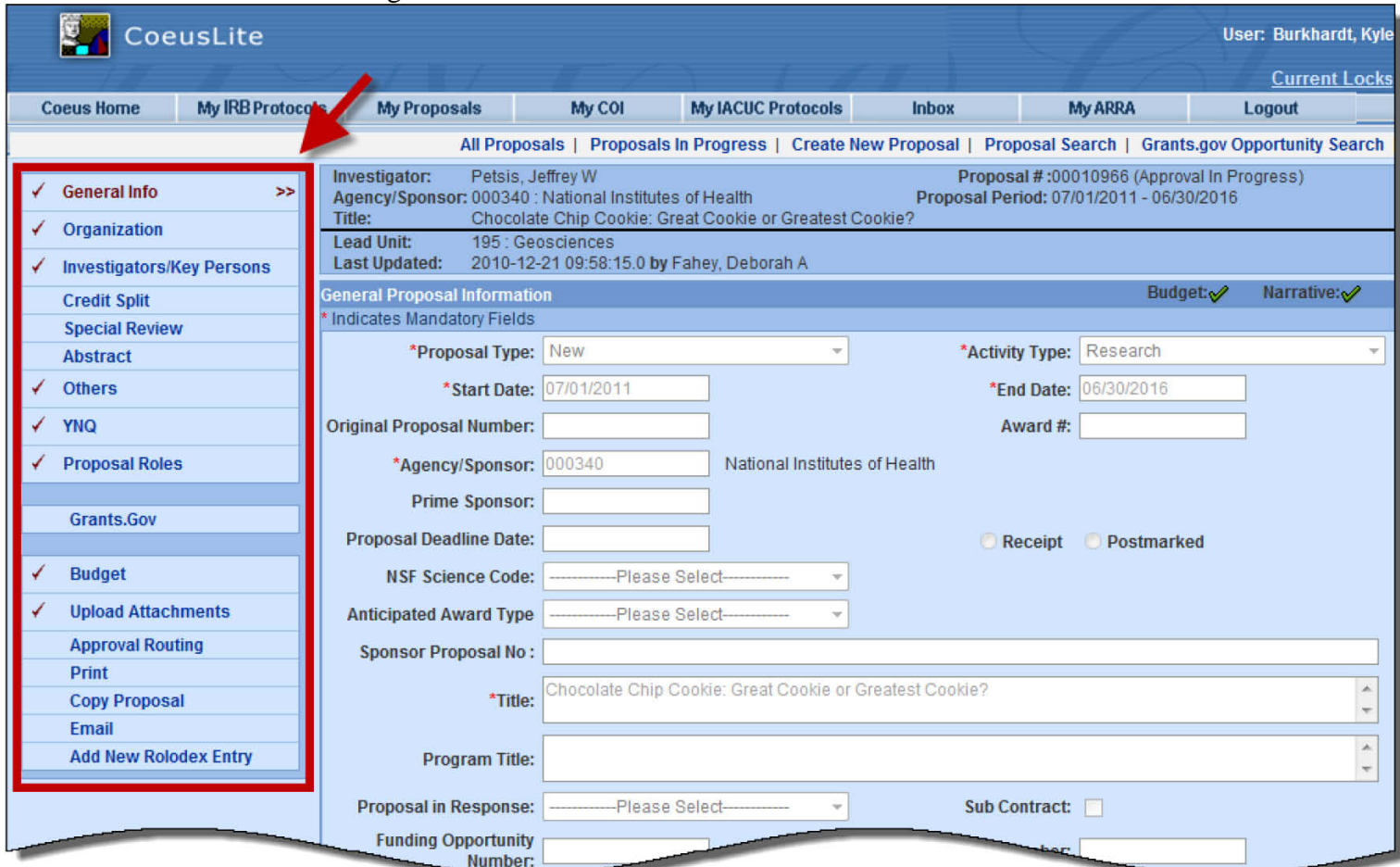
### Viewing detailed proposal information

These instructions are for cases when you want to view the proposal in more detail. The detail included in these windows is the same as the detail in Coeus Premium.

1. Click on the Proposal Details link.



2. You can then click through the links on the left side of the screen to review more detailed information.

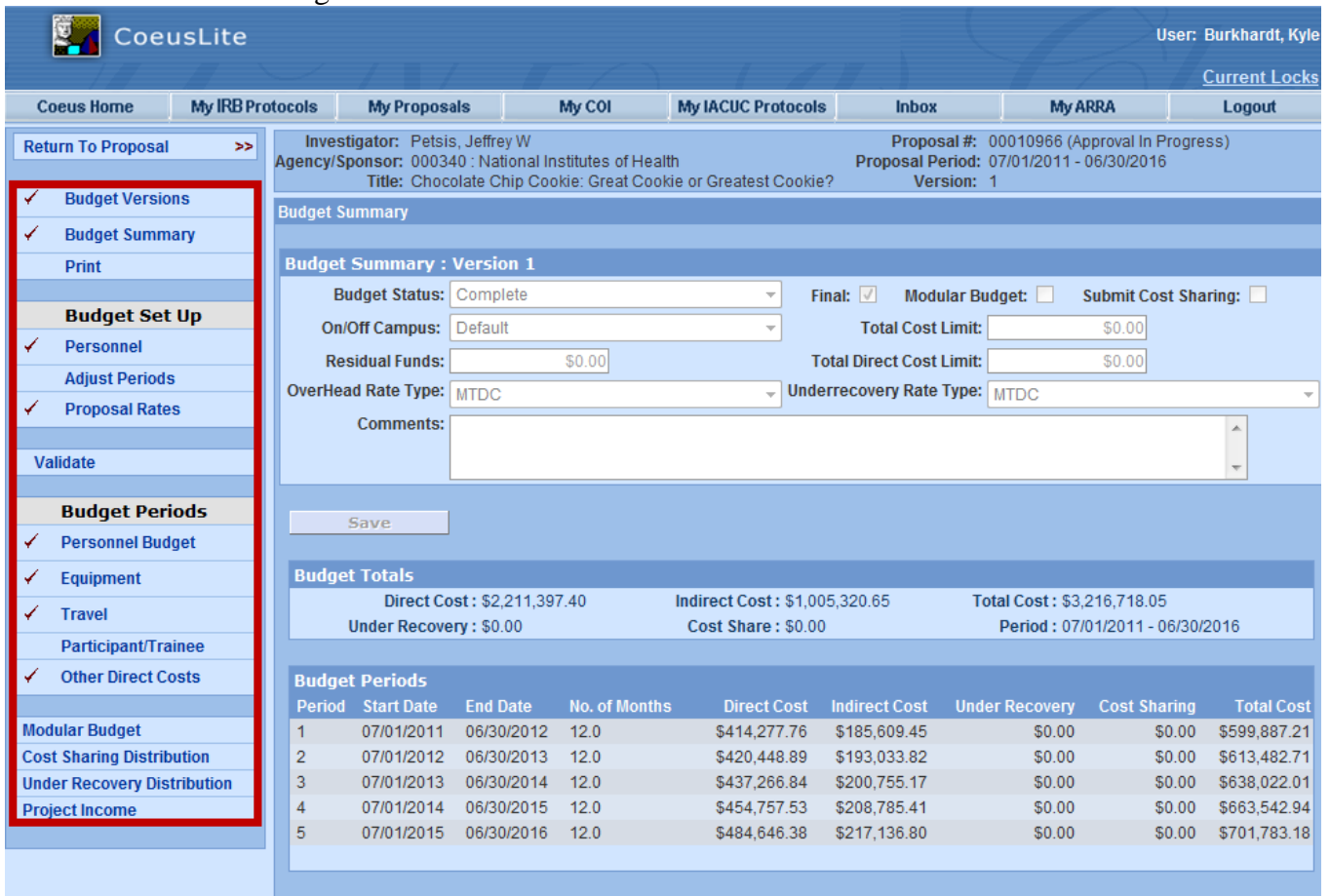


3. If you clicked on the Budget link and there are multiple budget versions, click on Open to view the detailed budget for the final version, which is noted by a check mark in the Final box. If there is only

one budget version you won't see this screen because CoeusLite will display the budget.



4. You can then click through various links on the left side in order to see more detail.



5. Here, the Travel link was clicked on an detailed information can be seen about the Travel. Click on "Return to Proposal" to return to the main proposal screen.

## Approving Proposals and Subaward Invoices in CoeusLite 4.4.3

**CoeusLite** User: Burkhardt, Kyle

Navigation: Coeus Home | My IRB Protocols | **My Proposals** | My COI | My IACUC Protocols | Inbox | My ARRA | Logout

**Return To Proposal** (highlighted with red box and arrow)

Investigator: Petsis, Jeffrey W | Proposal #: 00010966 (Approval In Progress)  
 Agency/Sponsor: 000340 : National Institutes of Health | Proposal Period: 07/01/2011 - 06/30/2016  
 Title: Chocolate Chip Cookie: Great Cookie or Greatest Cookie? | Version: 1

Period 1 | Period 2 | Period 3 | Period 4 | Period 5

**Period Totals**

Direct Cost : \$414,277.76	Indirect Cost : \$185,609.45	Total Cost : \$599,887.21	No. of Months : 12.0
Under Recovery : \$0.00	Cost Share : \$0.00	Period : 07/01/2011 - 06/30/2012	

**Budget Travel - Domestic Travel Costs (Incl. Canada, Mexico and U.S. Possessions) & Foreign Travel Costs**

Type	Description	Funds Requested (\$)	Details	Remove
13-Travel - Domestic	jeff goes to SRF	\$5,000.00	Details	Remove
13-Travel - Domestic	marcia goes to venice	\$10,000.00	Details	Remove
13-Travel - Domestic	chiz goes to peru	\$15,000.00	Details	Remove

Total Travel Cost: **\$30,000.00**

Buttons: Add Travel | Calculate | Save

6. Then click on Approval Routing to return to the screen where you can approve or reject the proposal.

**CoeusLite** User: Burkhardt, Kyle

Navigation: Coeus Home | My IRB Protocols | **My Proposals** | My COI | My IACUC Protocols | Inbox | My ARRA | Logout

Links: All Proposals | Proposals In Progress | Create New Proposal | Proposal Search | Grants.gov Opportunity Search

Investigator: Petsis, Jeffrey W | Proposal #: :00010966 (Approval In Progress)  
 Agency/Sponsor: 000340 : National Institutes of Health | Proposal Period: 07/01/2011 - 06/30/2016  
 Title: Chocolate Chip Cookie: Great Cookie or Greatest Cookie?  
 Lead Unit: 195 : Geosciences  
 Last Updated: 2010-12-21 09:58:15.0 by Fahey, Deborah A

**General Proposal Information** Budget:  Narrative:

\* Indicates Mandatory Fields

\*Proposal Type: New | \*Activity Type: Research  
 \*Start Date: 07/01/2011 | \*End Date: 06/30/2016

Original Proposal Number: | Award #: |  
 \*Agency/Sponsor: 000340 National Institutes of Health  
 Prime Sponsor: |  
 Proposal Deadline Date: |  Receipt  Postmarked

NSF Science Code: -----Please Select-----  
 Anticipated Award Type: -----Please Select-----  
 Sponsor Proposal No: |  
 \*Title: Chocolate Chip Cookie: Great Cookie or Greatest Cookie?  
 Program Title: |

Proposal in Response: -----Please Select----- | Sub Contract:   
 Funding Opportunity Number: | CFDA Number: |  
 Agency Program Code: | Agency Div Code: |

Left Sidebar: **Approval Routing** (highlighted with red box and arrow)

## Viewing Premium Cost Sharing Reports in CoeusLite

Click on the Print link in the left column, then click on SHOW next to "Cost Share Reports & Generic Cover Page." Then check off the Cost Share reports and click Print Selected.

- NOTE: If you are on the approval screen, you won't see the Print link. Instead, click on "Proposal Details" in the left column, then the screen will refresh itself and the Print link will appear in the left column.
- NOTE: If you are in the budget screen and press Print, the reports that are shown are different reports than what is referred to here. Click on "Return to Proposal" in the left bar, then the screen will refresh itself and the Print link will appear in the left column.

The PU\_CostShareReport.xml shows the cost sharing distribution by unit.

The PU\_CostShareDetailsReport.xml shows the cost sharing amounts by cost element type.

## Logging out

- If you are done with your CoeusLite session, click on the Logout button in the upper right corner of the screen.

## Viewing, Approving and Rejecting Subaward Invoices

You can view a subaward invoice and approve or reject it through CoeusLite. You will know when you have an invoice awaiting approval because you will receive an email from a generic Coeus email address with the subject “Subcontract invoice approval request Subcontract # 12345 invoice # 9876”.

### Logging in

- Click on the link in the notification e-mail to display the CoeusLite LDAP Login page where you can sign onto CoeusLite.
- Type your NetID in the *User Name* field and your LDAP password in the *Password* field, and click the

login button.

### Viewing subaward invoices

- If you used the link in the email, the proposal page will open directly to the subaward summary page, as shown below. *(If the invoice summary screen does not appear as shown below, click on Inbox, then click on the title or number of the subcontract. The invoice details screen will appear.)*
- The subaward code, status, subcontractor, requisitioner name & unit are displayed. Summary information about the invoice is also displayed. You can now view the subaward invoice yourself by clicking on the View link. This will open a separate browser window and display the PDF of the subaward invoice.

## Approving Proposals and Subaward Invoices in CoeusLite 4.4.3

The screenshot shows the CoeusLite web application interface. At the top, the user is identified as "User: Burkhardt, Kyle D". The navigation menu includes "Coeus Home", "My IRB Protocols", "My Proposals", "My COI", "My IACUC Protocols", "Inbox", "My ARRA", and "Logout". Below the navigation menu, there are links for "All Proposals", "Proposals In Progress", "Create New Proposal", "Proposal Search", and "Grants.gov Opportunity Search". On the left side, there are buttons for "Back to Inbox", "Approve", and "Reject". The main content area is titled "Subcontract Invoice Details" and contains two summary sections: "Subcontract Summary" and "Invoice Summary".

Subcontract Summary	
Subcontract Code :	00001234
Subcontract Status :	Active
Subcontractor :	Cookie University
Requisitioner Name :	Burkhardt, Kyle D
Requisitioner Unit :	670 - Office of Res & Proj Admin
Sequence Number :	23
Sub Award Type :	Subaward

Invoice Summary			
Invoice Number :	10777	Invoice Amount :	\$5,555.55
Invoice Start Date :	11/01/2010	Invoice End Date :	11/30/2010
Invoice Status :	Sent		
Invoice Effective Date :	12/15/2010		
Subcontract Invoice:	<a href="#">View</a>		

- After clicking on View, a separate browser window opens and displays the PDF of the subaward

The screenshot shows a browser window displaying a PDF of a subaward invoice. The browser address bar shows the URL "https://puwebd.princeton.edu:8443/irb/Streamin...". The PDF content includes the following information:

**Cookie University**  
123 Chocolate Lane  
Cocoa, PA 12345

**Subaward Invoice:** 1234-5678  
**Title:** Investigation into the Best Chocolate Chip Cookies  
**Investigator:** Dr. Chippy McChipperton

invoice.

- When you are done viewing the invoice, you can close the browser window displaying the invoice. Then select either the approve or reject links on the left side of the screen.

The screenshot shows the CoeusLite interface. At the top, the user is identified as 'User: Burkhardt, Kyle D'. Below the header is a navigation menu with options: Coeus Home, My IRB Protocols, My Proposals, My COI, My IACUC Protocols, Inbox, My ARRA, and Logout. A secondary menu includes: All Proposals, Proposals In Progress, Create New Proposal, Proposal Search, and Grants.gov Opportunity Search. On the left side, there is a vertical menu with 'Back to Inbox', 'Approve', and 'Reject' buttons. The 'Approve' button is highlighted with a red box. The main content area is titled 'Subcontract Invoice Details' and contains two summary sections:

Subcontract Summary			
Subcontract Code :	00001234	Sequence Number :	23
Subcontract Status :	Active	Sub Award Type :	Subaward
Subcontractor :	Cookie University		
Requisitioner Name :	Burkhardt, Kyle D		
Requisitioner Unit :	670 - Office of Res & Proj Admin		

Invoice Summary			
Invoice Number :	10777	Invoice Amount :	\$5,555.55
Invoice Start Date :	11/01/2010	Invoice End Date :	11/30/2010
Invoice Status :	Sent		
Invoice Effective Date :	12/15/2010		

At the bottom of the invoice summary, there is a link: 'Subcontract Invoice: [View](#)'.

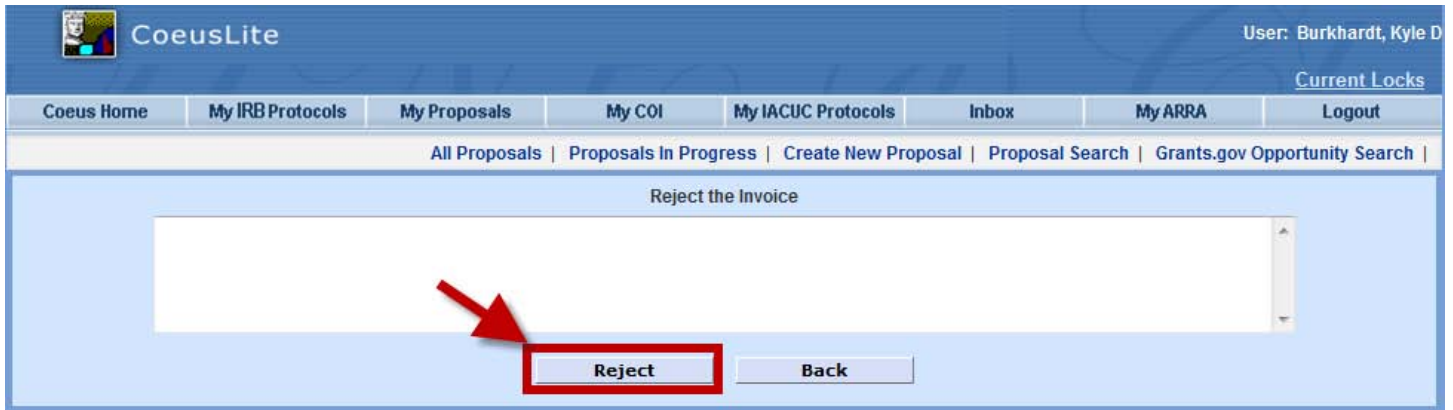
### Approving subaward invoices

If you have reviewed the invoice and want to approve it, click on the Approve link on the left side of the screen. If you have comments to make, enter the comments in the box and press the Approve button. Comments are not mandatory. Click on the back button if you didn't meant to press the Approve button.

The screenshot shows the 'Approve the Invoice' screen. At the top, the user is identified as 'User: Burkhardt, Kyle D'. Below the header is a navigation menu with options: Coeus Home, My IRB Protocols, My Proposals, My COI, My IACUC Protocols, Inbox, My ARRA, and Logout. A secondary menu includes: Current Locks. The main content area is titled 'Approve the Invoice' and contains a large text input box for comments. Below the input box are two buttons: 'Approve' and 'Back'. The 'Approve' button is highlighted with a red box, and a red arrow points to it from the left.

### Rejecting subaward invoices

- If you want to reject the invoice after reviewing it, press the reject link on the left side of the screen. Enter comments about why you are rejecting the proposal in the box. Rejection comments are mandatory. Then press the Reject button. Click on the back button if you didn't meant to press the Reject button.

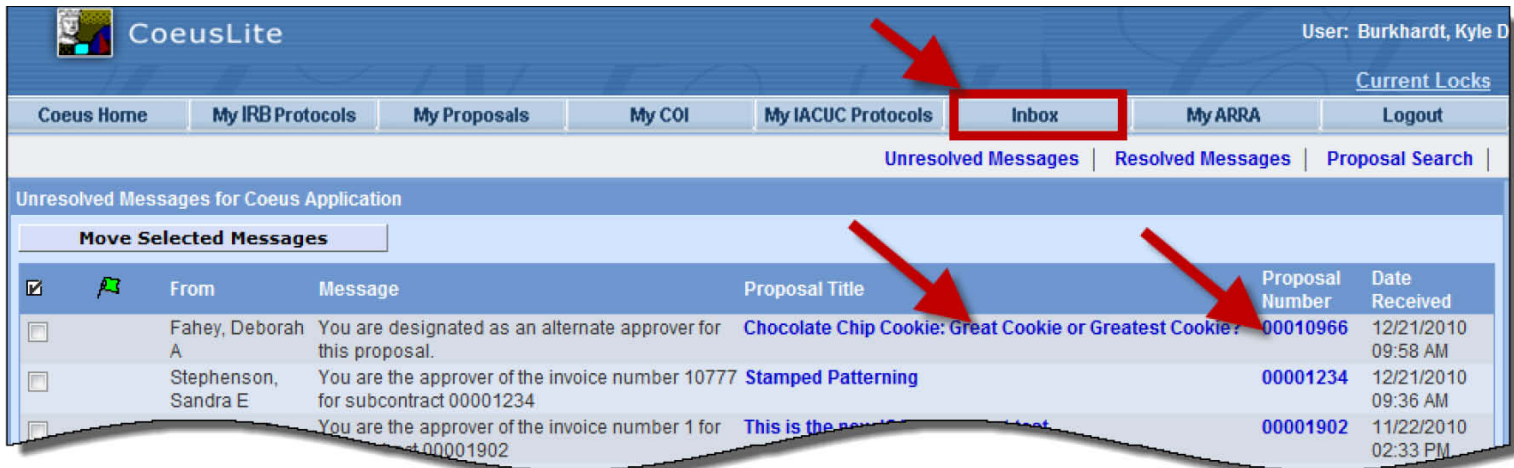


- If you are finished, then you can press the Logout button in the upper right corner of the screen.

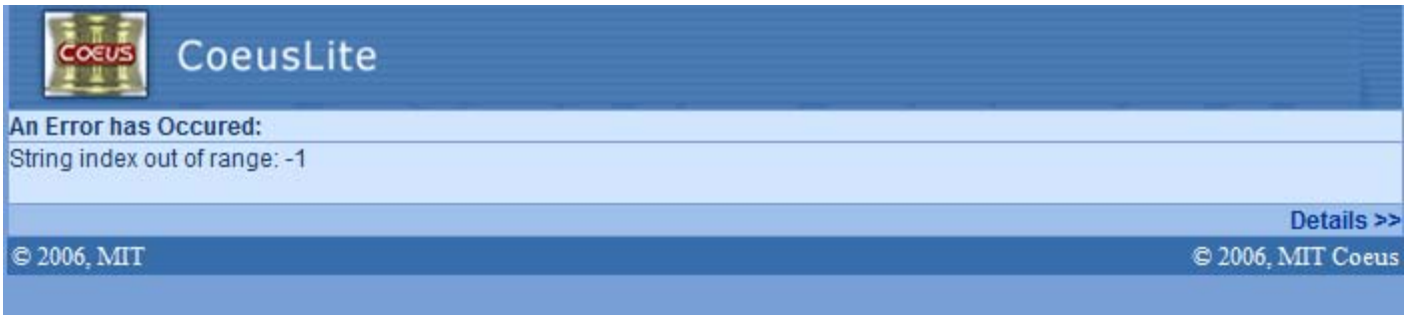


### Reviewing additional subaward invoices

1. If you have additional subcontract invoices to review, click on the Inbox link.



2. A list of all the proposals, subawards awaiting approval or any notifications will be listed here. Click on the title or number for the next subaward invoice you need to approve. The subaward summary screen will appear and you can view the invoice, and approve or reject as described above.
3. If you try to move a subaward message from unresolved to resolved and you have not approved it yet, you will get an error message "String index out of range: -1".

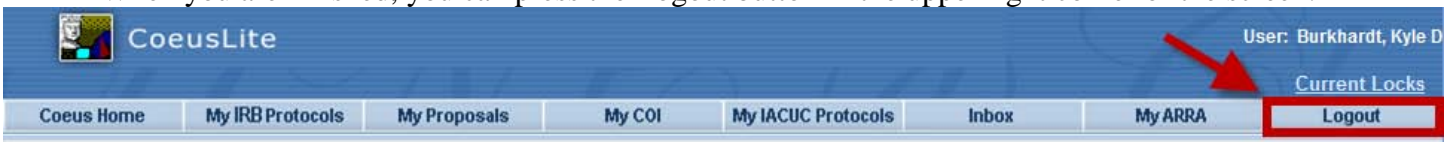


message in red. In order to approve or reject, you must click on the title or number for the line to access the view link as well as approval and rejection screens. (You actually should get a message in red telling you to click on the title or number for the line to access the approval and rejection screens; it's a bug that it's showing a "-1" error message instead. Below is the message it should display.)



### Logging out

- When you are finished, you can press the Logout button in the upper right corner of the screen.



## Inbox Maintenance

### Unresolved Messages

1. Open CoeusLite by using the generic CoeusLite URL and logging in as described previously. The CoeusLite home page will open.

The screenshot shows the CoeusLite home page. At the top right, the user is identified as 'User: Burkhardt, Kyle D'. Below the header is a navigation bar with buttons for 'Coeus Home', 'My IRB Protocols', 'My Proposals', 'My COI', 'My IACUC Protocols', 'Inbox', 'My ARRA', and 'Logout'. The 'Inbox' button is highlighted with a red box and a red arrow. The main content area features a 'Welcome to CoeusLite' heading and a section titled 'Primary Features of Coeus Lite include:' with links to 'My Protocols', 'My Proposals', 'COI Disclosure', and 'Inbox'. A 'Coeus Mission' box is on the right, and a 'Coeus Premium' box is on the left.

2. Click on the Inbox button. Your unresolved messages folder will be displayed automatically. A list of all proposals and subaward invoices awaiting approval will be listed. Any proposal notifications will be listed as well. Click on the title or number for the proposal development proposal which you want to review.

The screenshot shows the 'Unresolved Messages for Coeus Application' page. It includes a 'Move Selected Messages' button and a table of messages. The table has columns for 'From', 'Message', 'Proposal Title', 'Proposal Number', and 'Date received'. Red arrows point to the 'Proposal Title' and 'Proposal Number' columns. The messages listed are:

From	Message	Proposal Title	Proposal Number	Date received
Fahey, Deborah A	You are designated as an alternate approver for this proposal.	Chocolate Chip Cookie: Great Cookie or Greatest Cookie?	00010966	12/21/2010 09:58 AM
Stephenson, Sandra E	You are the approver of the invoice number 10777 for subcontract 00001234	Stamped Patterning	00001234	12/21/2010 09:36 AM
Stephenson, Sandra E	You are the approver of the invoice number 1 for subcontract 00001902	This is the new ICA agreement test	00001902	11/22/2010 02:33 PM

3. You may see green, yellow, or red flags next to certain proposal lines. These flags indicate that the deadline date for a proposal is within a certain number of days.

<input type="checkbox"/>		Moody, Denise M	The Proposal 00009302 has been submitted to the sponsor. The Institute proposal number is 00021301	J. Petsis COEUS Testing - Premium NIH R01 04/26/2010	00009302	04/28/2010 02:46 PM
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- The key to the flags is shown at the bottom of the Inbox.

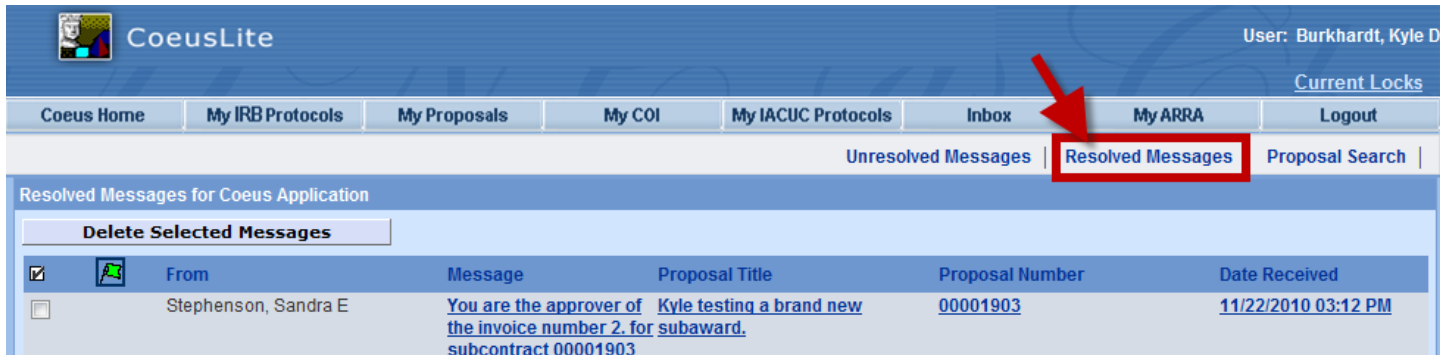


## Resolved Messages

- If there are notifications that you want to move, click on the checkbox on the left side of the screen, then click the “Move Selected Messages” button.



- The message will then moved to the Resolved Messages folder. Note: If you try to move a subaward invoice that you have not approved or rejected, Coeus will display a "-1" error message. You must approve or reject the subaward invoice, and when you do the message will automatically move from the Unresolved to the Resolved folder. So the -1 error message means, Coeus will not let you move the invoice from unresolved to resolved, because it's not approved.
- To view the messages in your resolved folder, click on the Resolved Messages link. Your resolved folder will be displayed.



- To delete messages from the Resolved folder, click on the checkbox on the left side for each message to be deleted, then click on “Delete Selected Messages”.

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## Need Help Or Manuals?

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- Visit the [Princeton Coeus web page](#) for various Coeus manuals.
- Email [coeus\\_help@princeton.edu](mailto:coeus_help@princeton.edu)
- Call the Coeus coordinator at 8-7373.