



## Coeus Premium 4.4.3 Quick Start: Basics (December 20, 2010)

### Accessing Coeus Premium








- Click on the Coeus 4.4.3 Premium, Production link on the Princeton Coeus page
- Enter your LDAP user name and password in the Logon box

### Logging Out

- Save your work and then click on the Exit icon  on the toolbar.

### Frequently used icons

Coeus has a lot of toolbar icons. The first toolbar applies to the application as a whole. The second toolbar applies to the module you selected. A yellow box appears with the icon's name by hovering the mouse over the icon.

Icon	Name	Icon	Name
	Inbox		Rolodex
	Award		Sponsor
	Institute Proposal		Subcontracts
	Proposal Development		Exit/logout
	Search		Medusa
	Save		Add
	Sort		Modify proposal

### Searching

- Click on the icon for the appropriate module (in this example, the proposal development module.) The search window for that module opens.







- You can search by ID number, status, PI name, title and more.
- You can combine searches on one line (i.e. searching for all "new" proposals by Einstein with the word energy in the title) or search for multiple items on more than one line (i.e. searching for proposals in more than one unit).
- Use the \* for wildcard searching (i.e. \*energy\*)
- You no longer need to enter the leading zeros to find one proposal. Instead, use \* as the wildcard.

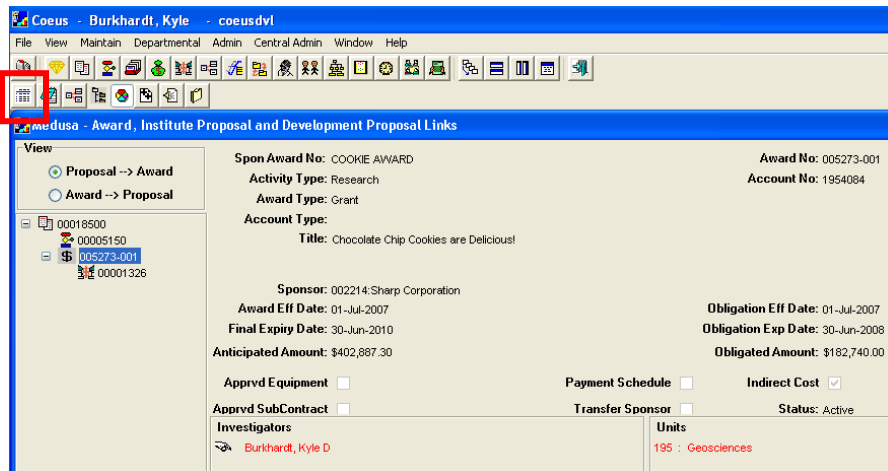
Operator/example	Use to...
*Einstein*	...search for Einstein's proposals in the Investigator box
*1234	...search for the proposal ending in 1234
*1234*	...search for proposals containing 1234
>00005000	...search for proposals numbered greater than 00005000 (must use all leading zeros)
<=00005000	...search for proposals numbered less than or equal to 00005000 (must use all leading zeros)
*energy*	...search for titles containing the word energy

- Double click on any search result to view it.
- Search results in the Proposal Development, Institute Proposal and Subcontracts modules are listed in reverse numerical order, so recent proposals/subcontracts are listed first.







## Using Medusa

Each item in a module has a different tracking number. Medusa links the various module tracking numbers to each other. So if you know the award number but need to find the proposal development number and view the proposal development proposal, Medusa will show the linkages for the numbers.

- Search for the item in the module where the number is known. (i.e. you know the P/G number for an award is 1954084. Search in the Award module for account number 1954084.)
- Click on the Medusa  button. Medusa will show, on the left side, the Institute Proposal  number, the Proposal Development  number, the Award  number, and subcontract  numbers, if any are available.
- Click on the number to highlight it (it turns blue) and then click on the Display  button to view the information in that module.




## A Guide to Coeus Numbers

Number	Format	Example	Module	Symbol
Proposal Development	8 digit number; starts with 4 or 3 zeros	00001234 00012345	Proposal Development	
Institute Proposal	8 digit number; typically starts with 3 zeros	00012345	Institute Proposal	
Coeus Award number	6 digit number and a dash followed by 3 numbers; typically starts with 2 zeros	001234-001	Award (use Award Number box)	
Project/Grant Number	7 digit number; first three numbers are the dept number. If the 4 <sup>th</sup> digit is a 4, it's a non-govt sponsor. If the 4 <sup>th</sup> digit is a 6, it's a govt sponsor. If the 4 <sup>th</sup> digit is a 3, it's an internal cost sharing account. (2000 accounts are not in Coeus)	1234567	Award (use the Account Number box)	
Sponsor Award Number	Any format.	Any format.	Award (use Sponsor Award Number box)	
Subcontract Number	8 digit number; typically starts with 4 zeros	00001234	Subcontract	

# Coeus Premium 4.4.3 Quick Start: Proposal Development Narrative and Budget Viewing

## Viewing the Narrative in Proposal Development


The Proposal Development module is where department users enter the narrative, budget, and other information for their proposal. This section describes viewing the narrative.

- Search for the proposal and double click on the search result to open it.
- Click on the Narrative  button on the second toolbar.
- Highlight the narrative type you want to view by clicking on it once (the line turns blue), then click on the Word or PDF icon on the left side of the line.
- The narrative opens in a separate browser window.
- Close the browser window when you are finished reviewing it.

The complete proposal may have been uploaded by ORPA as the "Complete Proposal – ORPA Uploaded" narrative type, or it may be listed by its components, or both.

No.	Status	Narrative Type	Title
1	Complete	Narrative	
2	Complete	Budget_Justification	
3	Complete	Project_Summary	
4	Complete	Other	
5	Complete	PI certification	

## Viewing the Budget in Proposal Development

- Open the proposal and click on the Budget  button. The Select Budget screen will open.
- Click on display to view the final, complete budget.

**Select Budget**

Proposal Number: 00009319  
Sponsor: 002214 - Sharp Corporation

Budget Status: Complete Final Version: 1

Version	Start Date	End Date	Total Cost	Final
1	01 Jun 2010	31 May 2013	\$287,442.94	<input checked="" type="checkbox"/>
2	01 Jun 2010	31 May 2013	\$105,366.65	<input type="checkbox"/>

Direct Cost: \$198,863.25    Underrecovery: \$0.00  
 Indirect Cost: \$88,579.69    Residual Funds: \$0.00  
 Cost Sharing: \$0.00    OH Rate Type: MTDC

Last Updated: 10-May-2010 03:32 PM    Updated User: Fahey, Deborah A

- The Display Budget screen will then open, showing summary information.

Display Budget for Proposal 00009319, Version 1

Summary | Period 1 | Period 2 | Period 3 | Total

Version: 1 Final:  Start Date: 01-Jun-2010 End Date: 31-May-2013

Residual Funds: \$0.00 Total Cost Limit: \$0.00 OH Rate Type: MTDC

Total Cost: \$287,442.94 Total Direct Cost Limit: \$0.00 Direct Cost: \$198,863.25


Indirect Cost: \$88,579.69 Underrecovery: \$0.00 Cost Sharing: \$0.00

Budget Status: Complete

UR Rate Type: MTDC

On/OH Campus: Default

Modular Budget:

Proposal Hierarchy: 

Period	Start Date	End Date	No. of Months	Total Cost	Direct Cost	Indirect Cost	Cost Sharing	Underrecovery
1	01-Jun-2010	31-May-2011	12.0	\$119,604.62	\$80,800.39	\$38,804.23	\$0.00	\$0.00
2	01-Jun-2011	31-May-2012	12.0	\$82,273.68	\$57,873.94	\$24,399.74	\$0.00	\$0.00
3	01-Jun-2012	31-May-2013	12.0	\$85,564.64	\$60,188.92	\$25,375.72	\$0.00	\$0.00

- Click on the tabs to view detailed budget information for each period.

Display Budget for Proposal 00009319, Version 1

Summary | Period 1 | Period 2 | Period 3 | Total

Start Date: 01-Jun-2010 End Date: 31-May-2011 Cost Limit: \$0.00 No. of Months: 12.0

Total Cost: \$119,604.62 Direct Cost: \$80,800.39 Indirect Cost: \$38,804.23

Underrecovery: \$0.00 Cost Sharing: \$0.00 Direct Cost Limit: \$0.00

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date
1	BPG201	01-Faculty Salaries	line 1	1.00	\$20,800.00	01-Jun-2010	31-May-2011
2	BPG233	11-Publications, Reprints, Pages	line 2	0.00	\$5,232.36	01-Jun-2010	31-May-2011
3	BPG275	13-Travel - Domestic	line 3	0.00	\$2,153.36	01-Jun-2010	31-May-2011
4	BPG239	12-Subcontract up to \$25,000	line 4	0.00	\$152.36	01-Jun-2010	31-May-2011
5	BPG276	14-Travel - Foreign	line 5	0.00	\$487.65	01-Jun-2010	31-May-2011
6	BPG239	12-Subcontract up to \$25,000	line 6	0.00	\$2,653.36	01-Jun-2010	31-May-2011
7	BPG236	22-Subcontract over \$25,000 (no IDC)	line 7	0.00	\$4,841.23	01-Jun-2010	31-May-2011
8	BPG212	19-Assistants in Research Tuition (no IDC)	line 8	0.00	\$1,234.56	01-Jun-2010	31-May-2011
9	BPG239	12-Subcontract up to \$25,000	line 9	0.00	\$25,000.00	01-Jun-2010	31-May-2011
10	BPG236	22-Subcontract over \$25,000 (no IDC)	line 10	0.00	\$11,111.11	01-Jun-2010	31-May-2011


- Click on the Total tab to view totals.

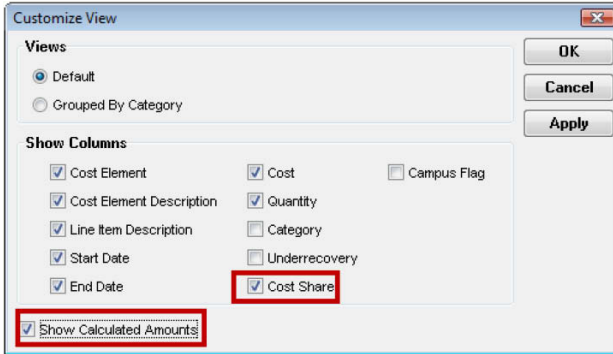
Display Budget for Proposal 00009319, Version 1

Summary | Period 1 | Period 2 | Period 3 | Total

Cost Element	Description	Period 1	Period 2	Period 3	Total
BPG201	01-Faculty Salaries	\$20,800.00	\$21,632.00	\$22,497.28	\$64,929.28
BPG212	19-Assistants in Research Tuition (no IDC)	\$1,234.56	\$1,283.94	\$1,335.30	\$3,853.80
BPG233	11-Publications, Reprints, Pages	\$5,232.36	\$5,441.65	\$5,659.32	\$16,333.33
BPG236	22-Subcontract over \$25,000 (no IDC)	\$15,952.34	\$16,590.43	\$17,254.06	\$49,796.83
BPG239	12-Subcontract up to \$25,000	\$27,805.72	\$2,759.49	\$2,869.87	\$33,435.08
BPG275	13-Travel - Domestic	\$2,153.36	\$2,329.49	\$2,329.07	\$6,721.92
BPG276	14-Travel - Foreign	\$487.65	\$507.16	\$527.45	\$1,522.26
	OH - MTDC	\$38,804.23	\$24,399.74	\$25,375.72	\$88,579.69
	Employee Benefits - Research Rate	\$7,134.40	\$7,419.78	\$7,716.57	\$22,270.75
	Vacation - Vacation	\$0.00	\$0.00	\$0.00	\$0.00
	<b>Total</b>	<b>\$119,604.62</b>	<b>\$82,273.68</b>	<b>\$85,564.64</b>	<b>\$287,442.94</b>

## Viewing Cost Sharing in the Proposal Development budget

- With a period tab open, click on the Customize View  button. The Customize view screen opens.
- Check the “Cost Share” box. You can also check off “Show Calculated Amounts” to view calculated EB and OH amounts for each cost element.



**Customize View**

Views

Default

Grouped By Category

Show Columns

Cost Element  Cost  Campus Flag

Cost Element Description  Quantity

Line Item Description  Category

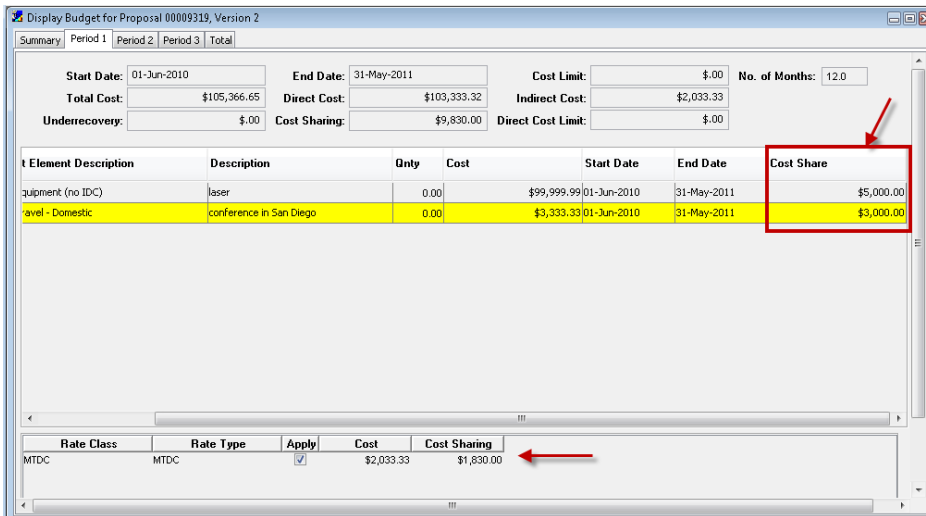
Start Date  Underrecovery

End Date  Cost Share

Show Calculated Amounts

OK Cancel Apply

- A scroll bar will then appear at the bottom of the screen. Scroll it to the right to see the Cost Share column. Also notice that the EB and OH calculations are listed at the bottom of the screen.



Display Budget for Proposal 00009319, Version 2

Summary Period 1 Period 2 Period 3 Total

Start Date: 01-Jun-2010 End Date: 31-May-2011 Cost Limit: \$0.00 No. of Months: 12.0

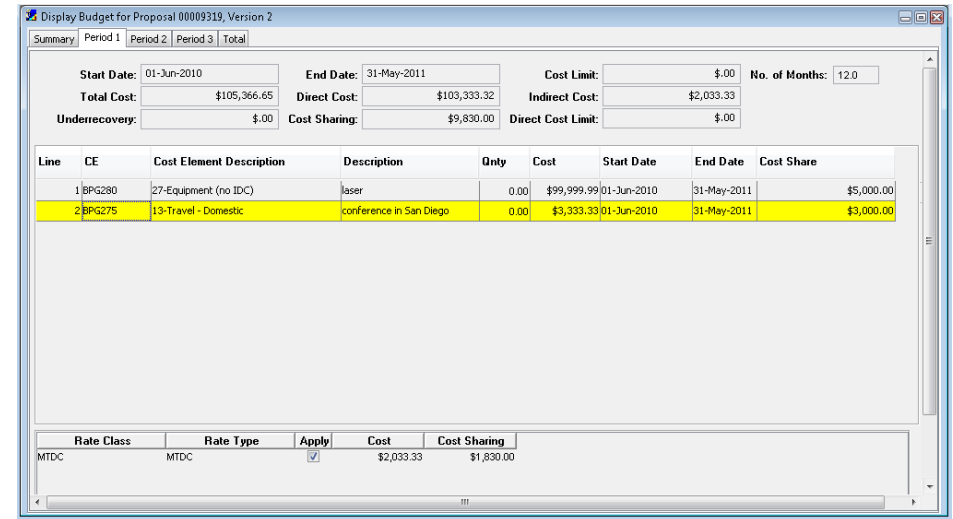
Total Cost: \$105,366.65 Direct Cost: \$103,333.32 Indirect Cost: \$2,033.33

Underrecovery: \$0.00 Cost Sharing: \$9,830.00 Direct Cost Limit: \$0.00

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date	Cost Share
1	BPG280	27-Equipment (no IDC)	laser	0.00	\$99,999.99	01-Jun-2010	31-May-2011	\$5,000.00
2	BPG275	13-Travel - Domestic	conference in San Diego	0.00	\$3,333.33	01-Jun-2010	31-May-2011	\$3,000.00

Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$2,033.33	\$1,830.00

- You can also shrink the size of each column (by clicking on the column divider and moving it) in order to view all columns on one screen



Display Budget for Proposal 00009319, Version 2

Summary Period 1 Period 2 Period 3 Total

Start Date: 01-Jun-2010 End Date: 31-May-2011 Cost Limit: \$0.00 No. of Months: 12.0

Total Cost: \$105,366.65 Direct Cost: \$103,333.32 Indirect Cost: \$2,033.33

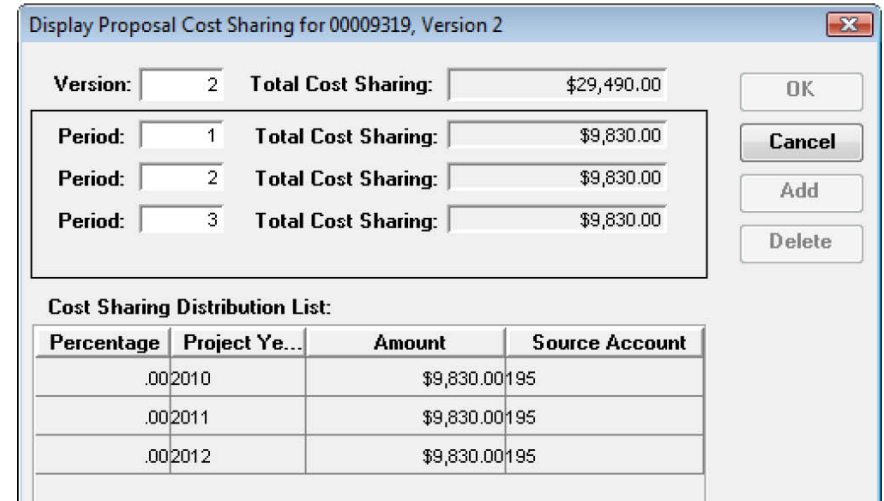
Underrecovery: \$0.00 Cost Sharing: \$9,830.00 Direct Cost Limit: \$0.00

Line	CE	Cost Element Description	Description	Qty	Cost	Start Date	End Date	Cost Share
1	BPG280	27-Equipment (no IDC)	laser	0.00	\$99,999.99	01-Jun-2010	31-May-2011	\$5,000.00
2	BPG275	13-Travel - Domestic	conference in San Diego	0.00	\$3,333.33	01-Jun-2010	31-May-2011	\$3,000.00

Rate Class	Rate Type	Apply	Cost	Cost Sharing
MTDC	MTDC	<input checked="" type="checkbox"/>	\$2,033.33	\$1,830.00

## Viewing Cost Share Distribution

- With the budget open, click on the Edit menu, and select Cost Sharing Distribution. The display proposal cost sharing screen will then open. (Note: Percentage is not used at Princeton).



Display Proposal Cost Sharing for 00009319, Version 2

Version: 2 Total Cost Sharing: \$29,490.00

Period: 1 Total Cost Sharing: \$9,830.00

Period: 2 Total Cost Sharing: \$9,830.00

Period: 3 Total Cost Sharing: \$9,830.00

OK Cancel Add Delete

Cost Sharing Distribution List:

Percentage	Project Ye...	Amount	Source Account
.00	2010	\$9,830.00	195
.00	2011	\$9,830.00	195
.00	2012	\$9,830.00	195

## Coeus Premium 4.4.3 Quick Start: Award and Award Budget Viewing

### Viewing Award Information



The Awards module is used when an institute proposal has been funded.

- Search for the award in the Award module and double click on the award to open it.
- Many tabs will open containing information about the award, such as terms, conditions, PI, general comments, and subcontracts related to this award, among other information. With this version forward, award documents are stored in the Attachments tab.

Display Award : 006741-001: Sequence : 2

Award Detail | Other Header | Money and End Dates | Contacts | Reports | Terms | Special Review | Investigator | Key Person | Comments | Subcontracts | Attachments | Other

Award No: 006741-001    Sequence No: 2    Status: Active

Sponsor Award No: COOKIE AWARD

Account: 1956580    NSF Code:    Effective Date: 01-May-2010

Modification No:    Execution Date:    Begin Date:    Execution Date:    Sponsor: 000340 National Institutes of Health

Activity Type: Research    Award Type: Grant    CFDA No: 93.389

Account Type:    DFafs No:    Sub Plan: Unknown    Procurement Priority Code:    Pre-Award

Authorized Amount: \$ .00    Effective Date:    Title: With grad students for printing on the form, cost share and special review go all the way through???

Last Update: 26-May-2010 03:23 PM    Update User: Burkhardt, Kyle D

- To view the budget, click on the Money and End Dates tab. The Obligated and Anticipated amounts, and effective and expiration dates, are listed.

Display Award : 006741-001: Sequence : 2

Award Detail | Other Header | Money and End Dates | Contacts | Reports | Terms | Special Review | Investigator | Key Person | Comments | Subcontracts | Attachments | Other

Award Transaction Type: Modification    Notice Date:    Comments:    Summary

	Obligated Total	Anticipated Total	Obligation Effective Date	Obligation Expiration Date	Final Expiration Date
[+] 006741-001 - 1956580	\$11,111.11	\$3,333.33	01-May-2010	30-Apr-2011	30-Apr-2012

1 Award in Hierarchy    View: Total    Distributed    Distributable    Dates    Budget    Ant. Funding    History    Expand All    Go To    Print    Media    Action Summary

- If there are multiple child accounts for an award, this screen would display a list of Coeus Award numbers ending in -002, -003, etc. If there are no child accounts, only the parent (-001) would be displayed. Click on the buttons on the bottom of the screen to see Total amounts, Distributed, and Distributable amounts. Click on History to see a history of the amounts entered into this award.

### Viewing Award Budget information

The Award Budget is contained inside the Awards module.

- With the Money and End Dates tab of the Award open, click on the Budget button. The Budget for Award screen opens. Multiple budget versions may be listed.

Budget for Award: 006741-001 Sequence: 2 Amount Sequence: 1

P/G Number: 1956580

Total Obligated Distributable Amount: \$11,111.11

Budget Version	Sequence Number	Start Date	Expiration Date	Budget Status	Budget Amount	Type	Update User	Update Timestamp
1	2	01-May-2010	30-Apr-2011	Submitted	\$11,111.11	New	Burkhardt, Kyle D	26-May-2010 03:23 PM

New    Modify    Display    Rebudget    Delete    Copy    Close

- Click once on a line to highlight it, then click on Display to see the budget.

Award Budget: New Submitted

Account No: 1956580    Obligated Amount: \$11,111.11    Budget Status: Submitted

Version: 1    Budget Amt: \$11,111.11    On Off Campus Flag:    Save    Submit    Request    Approve    Post    Close

Award No: 006741-001    Start Date: 01-May-2010    End Date: 30-Apr-2011

Sequence No: 2    Type: New

Description: New Cookie Budget

Comments: Chocolate Chip Cookies are the best

Line Number	Cost Element	Cost Element Description	Change Amount	Obligated Amount	Total Amount
1	BP0220	25-Materials & Services (includes equi...	\$3,000.00	\$3,000.00	\$3,000.00
2	BP0275	23-Travel - Domestic	\$1,000.00	\$1,000.00	\$1,000.00
3	BP0286	27-Equipment (no IDC)	\$4,671.11	\$4,671.11	\$4,671.11
Total:			\$8,671.11	\$8,671.11	\$8,671.11
1	BP0214	29-Fringe Benefits	\$0.00	\$0.00	\$0.00
2	BP0289	30-FSA Costs	\$2,440.00	\$2,440.00	\$2,440.00
Total:			\$11,111.11	\$11,111.11	\$11,111.11

Add    Delete    Print    Calculate

- You may need the scroll button to scroll down to see all budget lines.

### Viewing Cost Sharing in Awards

- With the cost sharing child award open, click on the Details menu and select Cost Sharing. The Cost Sharing window opens. (Note: Percentage is not used at Princeton).

Cost Sharing

Sponsor Award Number: COOKIE AWARD

Award Number: 006741-001    Sequence Number: 3

Percentage	Type	Fiscal Year	Source Account	Destination Account	Amount
.00	Equipment	2010	195	1952539	\$5,366.66
.00	Equipment	2011	195	1952537	\$5,366.66
.00	Equipment	2012	195	1952538	\$5,366.66

Total Amount: \$16,099.98

Comments: Comments would be shown here.

OK    Cancel    Add    Delete

## Coeus Premium 4.4.3 Quick Start: Institute Proposal and Subawards

### Viewing the Institute Proposal



The Institute Proposal number (IP) is assigned when the Proposal Development proposal has been approved by ORPA. This module includes proposal status information (pending, funded, declined).

- Search for the Institute Proposal in the IP module and double click on the result to open it.
- The IP screen then opens. Status and other information can be viewed.

Display Institute Proposal 00021234 Sequence 5

Proposal Mailing Info Investigators Key Person Cost Sharing IDC rates Special Review Science Codes IP Review Others

Proposal No: 00021234 Seq No: 5 Award Number: Status: Funded

Title: Chocolate Chip Cookies are Great

Proposal Type: Resubmission Sponsor Prpsl No: Activity Type: Research

Account: 1956580 NSF Code: Notice Of Opportunity:

Anticipated Award Type:

Sponsor: 000340 National Institutes of Health

Prime Sponsor:

	Initial Period	Total Period	Grad Students
Request Start Date:	01-Dec-2009	01-Dec-2009	Headcount: 0 Person Months: .00
Request End Date:	30-Nov-2010	30-Nov-2012	Account Type: <input type="radio"/> Research <input type="radio"/> Fund
Total Direct Cost:	\$1,660,280.06	\$5,182,730.25	Subcontract <input type="checkbox"/>
Total Indirect Cost:	\$36,770.83	\$114,783.84	Prop Create Date: 22-Dec-2009
Total All Cost:	\$1,697,050.89	\$5,297,514.09	Initial Contract Admin: Brittingham, Davine

Opportunity Id: PA-AA-R01 CFDA No: 93.389

Summary/Comments:

Last Update: 26-May-2010 03:31 PM Update User: Burkhardt, Kyle D

### Need help or more info?

Email: [coeus\\_help@princeton.edu](mailto:coeus_help@princeton.edu) Coeus hotline: 8-7373

Documentation: <http://www.princeton.edu/orpa/coeus>

Last update: December 20, 2010

### Viewing Subawards



- Search for the subaward in the subcontract module.
- Double click on the search result to view the subaward. Many tabs appear for the subaward, including Funding source, Amount Info, Amount Released, Contacts, and other information.

Display Subcontract 00001234: Sequence : 23

Subcontract Funding Source Amount Info Amount Released Contacts Closeout Others

Subcontract Code: 00001234 Seq. No: 23 Status: Active

Account No: 3396037

Subcontractor: The Regents of the University of Michigan

Start Date: 01-Mar-2006 End Date: 31-Aug-2009

Subaward Type: Subaward Purchase Order Num: ORPA001234

Title: Which Cookie is the Best Cookie?

Requisitioner: Burkhardt, Kyle D

Requisitioner Unit: 670, Office of Res & Proj Admin

Vendor Num: Closeout Date: 31-Oct-2009

Archive Location:

Comments:

Obligated Amount:	\$106,287.00	Anticipated Amount:	\$116,287.00
Available Amount:	\$7,987.67	Amount Released:	\$98,299.33

Last Update: 26-May-2010 03:32:27 PM Last Update User: Burkhardt, Kyle D

- To see if the subaward has been approved, click on the Amount Released tab and then look at the Status column. "Sent" indicates the invoice was sent to the PI for approval but it has not been approved yet. "Approved" means the invoice has been approved. A status of "Rejected" or "Rejection Approved" means the invoice was rejected. Older invoices may not have a status or their status may be "in progress" but they actually were approved. They were entered under a different procedure. Newer invoices with a status of "In Progress" indicate that ORPA is in the process of entering information about the invoice.

Display Subcontract 00001234: Sequence : 20

Subcontract Funding Source Amount Info Amount Released Contacts Closeout Others

Obligated Amount: \$96,287.00 Amount Available: \$0.00 Total Amount Released: \$96,287.00

Invoices:

Invoice Number	Start Date	End Date	Amount	Status	Eff Date	Comments	Approval Comments
1028282	01-Mar-2006	30-Sep-2006	\$530.09	Approved	07-Oct-2006	<<Invoice #1028282 for p...	
1029188	01-Oct-2006	31-Oct-2006	\$906.60	Approved	08-Nov-2006	<<Invoice #1029188 for p...	
1030784	01-Nov-2006	31-Dec-2006	\$11,035.03	Approved	09-Jan-2007	<<Invoice #1030784 for p...	
1031679	01-Jan-2007	31-Jan-2007	\$7,035.28	Approved	08-Feb-2007	<<Invoice #1031679 for p...	
1032517	01-Feb-2007	28-Feb-2007	\$16,285.66	Approved	08-Mar-2007	<<Invoice #1032517 for p...	

- Invoices have been stored in Coeus since the Dec 22, 2008. Highlight a line by clicking on it once, then click on the PDF icon once to view the PDF of the invoice. The PDF will open in a separate browser window.