



# Coeus Premium 4.4.3 Toolbar Guide

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## Coeus 4.4.3 Toolbars























This guide contains tables with descriptions of each toolbar button. While in Coeus, hover the mouse over the button to view the button's name.

The first (main) toolbar applies to the application as a whole. Once you select a button on the first toolbar, a second toolbar opens underneath, which applies to the module you selected.

### Main Toolbar

This is the main toolbar on the Coeus screen. This toolbar stays constantly on the screen as the upper toolbar.













Button	Button Name	Action
	Maintain Inbox	Display Coeus inbox.
	Maintain Awards	Opens the Awards window and toolbar
	Maintain Proposal	Opens the Institute Proposal window and toolbar
	Maintain Proposal Development	Opens the Proposal Development window and toolbar
	Maintain Rolodex	Opens the Rolodex window and toolbar
	Maintain Sponsor	Opens the Sponsor window and toolbar
	Maintain Subcontract	Opens the Subcontract window and toolbar
	Maintain Negotiations	Not used at Princeton. Opens the Negotiations window and toolbar.
	Maintain Business Rules	ORPA use only. Opens the Business Rule Maintenance window and toolbar
	Maintain Map	ORPA use only. Opens the Map Maintenance window and toolbar
	Maintain Personnel	ORPA use only. Opens the Personnel window and toolbar
	Maintain Users	ORPA use only. Opens the User Maintenance window and toolbar
	Maintain Unit Hierarchy	ORPA use only. Opens the Unit Hierarchy Maintenance window and toolbar
	Protocol	ORPA use only. Opens the IRB Protocol window and toolbar
	Schedule	ORPA use only. Opens the IRB Schedules window and toolbar
	Committee	ORPA use only. Opens the IRB Committee window and toolbar
	Protocol Submission	ORPA use only. Opens the IRB Submission List window and toolbar
	Cascade	Changes the view to display all open windows overlapping diagonally.
	Tile Horizontal	Changes the view to display all open windows tiled horizontally on the screen.
	Tile Vertical	Changes the view to display all open windows tiled vertically on the screen.
	Layer	Changes the view to display only the active window.
	Exit	Logs out and closes Coeus.

## Proposal Development Search Screen Toolbar

This is the toolbar that is displayed when you first open Proposal Development. It includes icons for the most common tasks (grouped by functional area) for finding a proposal in development or to initiate a new proposal for development.



Button	Button Name	Action
	Add a new proposal	Creates a new proposal and opens the Proposal Details window.
	Modify Selected Proposal	Opens the highlighted proposal in Modify/Edit mode for editing.
	Display Selected Proposal	Opens the highlighted proposal in View mode (can not be edited).
	Copy Selected Proposal	Copies the highlighted proposal (can select budget and/or narrative sections) to the bottom of the proposal list.
	Notepad	Opens the Notepad Window and allows the user to add a comment
	Medusa	Opens the Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Sort Proposals	Opens the Sort window and allows for sorting by multiple columns,
	Search for Proposal	Displays the Search window to conduct new searches.
	Save As	Saves the search results as csv, txt, htm, or xls formats.
	Close	Close the Proposal Development module.

## Proposal Development Toolbar

This is the toolbar displayed when a proposal is initiated or opened. It includes icons for the most common tasks in proposal development (grouped by functional area), including sub-toolbars (budget, narrative) for more detailed operations. Buttons may be grayed out depending on your Coeus user rights, the status of the proposal, and dependent on if you are viewing or editing a proposal.

Viewing a proposal:



Editing a proposal:



If a proposal is in a proposal hierarchy, there is an additional button:



Button	Button Name	Action
	Next Proposal	Opens the next proposal in Proposal Details
	Previous Proposal	Opens the previous proposal in Proposal Details
	Approve Proposal	Opens the Proposal Routing Window
	Submit Proposal for Approval	Initiates routing and approval
	Select Approval Map	Not used at Princeton. Approval maps are already set up in Coeus in advance.
	Proposal Narrative	Opens the Narrative for Proposal Window to add or edit narrative sections
	Proposal Budget	Opens the Select Budget Window to edit or create a budget
	Yes No Questions	Opens the Proposal Question Window to respond to the Yes No Questions and give explanations (where necessary)
	Proposal Roles Maintenance	Opens the Proposal Roles Window to view roles, rights and users as well as add or remove users
	Proposal Abstracts	Opens the Proposal Abstracts Window so that Abstracts can be pasted onto the appropriate tabs
	Proposal Persons	Opens the Proposal Personnel Window (to add the Biosketch, eRA Commons name and other PI data)
	Notepad	Opens the Notepad Window and allows the user to add a comment or view comments already included.
	Medusa	Opens the Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Print	Opens the Print window where you can select generic forms for paper printing.
	Save	Saves the proposal.
	Sync All (if parent proposal) Sync to Parent (if child proposal)	Appears only if proposal is in a hierarchy. Sync all children to the parent proposal (if parent) Syncs to parent (if it's a child proposal).
	Send Mail Notification	The new email button. Sends an email to notify individuals that you select.
	Close	Closes the proposal.

## Narrative Toolbar

This is the toolbar that is displayed when you open the Narrative Module. It includes icons for the most common tasks (grouped by functional area) for editing a narrative or adding a narrative to a proposal.



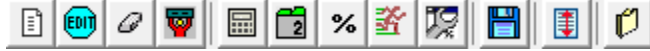
Button	Button Name	Action
	Add Module	Opens the Edit Module Details Window so that a module can be added
	Edit Module	Opens the Edit Module Details Window for the highlighted line so that a module can be edited
	Delete Module	Deletes the highlighted module
	Move Module Up One Row	Moves the highlighted module up on the list by one row
	Move Module Down One Row.	Moves the highlighted module down on the list by one row
	Upload Attachment	Opens the Open Window so that an attachment may be uploaded. PDF is preferred.
	Save	Saves narratives
	Close	Closes the Narrative Window.

## Budget Toolbar

This is the toolbar displayed when a proposal budget is opened. It includes icons for the most common tasks (grouped by functional area) for creating and editing a budget. Certain buttons may be grayed out if the budget is opened in modify mode.



If the proposal is in a hierarchy, the toolbar has an additional button:



Button	Button Name	Action
	Add Line Item	Adds a new line item with the cursor in the cost element field
	Line Item Details	Opens the Budget Line Item Detail Window so that a module can be edited
	Delete Line Item	Deletes the highlighted line item
	Personnel Budget for Line Item (red baron)	Opens the Personnel Budget Details Window for selected line item to add a person and salary
	Calculate Budget	Applies all automated calculations and refreshes the Budget Window
	Generate All Periods	Automatically applies Period 1 budget details on each outlying budget period, which includes inflation rate calculations. You can only generate once.
	Maintain Rates for the Period	Opens the Modify Rates for Proposal Window so that rates to be applied to the budget can be altered
	Budget Persons	Opens the Budget Persons Window, which lists available people for this budget
	Customize View	Allows the user to specify the way line item details are displayed in the budget window
	Save	Saves the budget.
	Sync All (if parent proposal) Sync to Parent (if child proposal)	Appears only if proposal is in a hierarchy. Sync all children to the parent proposal (if parent) Syncs to parent (if it's a child proposal).
	Close	Closes the Budget Window.

## Medusa Toolbar

This is the toolbar displayed when Medusa is opened. It allows you to examine the relationships among proposals in development, institute proposals and awards.



Button	Button Name	Action
	Open Selected Item in Display Mode	Opens the module for the highlighted number in display mode.
	Notepad	Opens the notepad for viewing or editing, depending on your roles.
	Open Negotiation Window for Selected Institute Proposal	Not used at Princeton.
	Display Award Hierarchy for Selected Award	Displays the Award Hierarchy.
	Display Summary for Selected Item	Opens the Summary Window of highlighted line for review.
	Expand Medusa Tree	Expands the Medusa Tree
	Collapse Medusa Tree	Collapses the Medusa Tree
	Close	Closes the Medusa Window.

## Rolodex Toolbar

This is the toolbar that is displayed when you open the Rolodex Module. It includes icons for the most common tasks (grouped by functional area) for finding a rolodex entry or adding/editing an entry. Depending on your Coeus roles, some buttons may be grayed out.











Button	Button Name	Action
	Add	Opens the Add New Rolodex Window to create new rolodex entry
	Modify	Opens the Display Rolodex Window for review and editing
	Display	Opens the Display Rolodex Window for review (not editable)
	Delete	Deletes the highlighted entry
	Copy	Opens the Copy Rolodex Window (copying the highlighted entry) to create a new rolodex entry for editing
	References	Not used at Princeton.
	Sort Rolodex	Opens Sort Window and allows for sorting by multiple column contents—either descending or ascending
	Search	Searches the rolodex.
	Save	Saves the search results in csv, txt, htm, xls formats.
	Close	Closes the Rolodex Window.

## Subcontract Search Screen Toolbar

This is the toolbar displayed after searching for a subaward in the search window. Some of these buttons will be grayed out because they are for ORPA use only.








Button	Button Name	Action
	Create a new subcontract	ORPA use only. Adds a new subcontract, subaward, PSPA, or CA.
	Correct subcontract	Not used.
	Display subcontract	Display a subcontract.
	Subcontract new entry	ORPA use only. Creates another sequence for an existing subcontract, subaward, PSPA, or CA.
	Sort subcontracts	Opens Sort Window and allows for sorting by multiple column contents—either descending or ascending
	Search for subcontracts	Opens Subcontract Search window.
	Save As	Save search results in csv, txt, htm or xls formats.
	Close	Closes the subcontract Window.

## Subcontract Toolbar

This is the toolbar displayed after selecting a subaward in the search results window. Some of these buttons will be grayed out because they are for ORPA use only.



Button	Button Name	Action
	Next Subcontract	View next subcontract on search results list.
	Previous Subcontract	View previous subcontract on search results list.
	Print	ORPA use only. Print subcontract/subaward/PSPA/CA forms.
	Save	ORPA use only. Saves this sequence.
	Close	Close the Subcontract on display.

## Awards Search Screen Toolbar

This is the toolbar displayed during award searches. Some of these buttons will be grayed out because they are for ORPA use only.



Button	Button Name	Action
	Create New Award	ORPA use only. Adds a new award.
	Correct Award	Not used.
	Display Award	Display an award.
	Award New Entry	ORPA use only. Creates another sequence for an existing award.
	Award Hierarchy	View the award hierarchy for the selected award.
	Notepad	View the notepad notes for the award.
	Reporting Requirements	View reporting requirements.
	Medusa	Opens the Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Sort Awards	Opens Sort Window and allows for sorting by multiple column contents—either descending or ascending
	Award Summary	View award summary for highlighted line.
	Search for Award	Search awards.
	Save	Save search results in csv, txt, htm or xls formats.
	Close	Close the Award module.

## Awards Toolbar

This is the toolbar displayed when viewing an award after selecting it on the search results screen. Some of these buttons will be grayed out because they are for ORPA use only or because only one search result was returned.



Button	Button Name	Action
	Next	View next award on search results list.
	Previous	View previous award on search results list.
	Print	Print Notice of Award.
	Notepad	View the notepad notes for the award.
	Reporting Requirements	View reporting requirements.
	Medusa	Opens Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Send Mail Notification	Sends an email to notify individuals that you select.
	Sync to Children	ORPA use only. Syncs parent data to children.
	Save	ORPA use only. Saves sequence.
	Close	Close the Award.

## Institute Proposal Search Screen Toolbar

This is the toolbar displayed during institute proposal searches. Some of these buttons will be grayed out because they are for ORPA use only.



Button	Button Name	Action
	Create Proposal	ORPA use only. Adds a new institute proposal.
	Correct Proposal	Not used.
	Display Proposal	Display an institute proposal.
	Proposal New Entry	ORPA use only. Creates another sequence for an existing institute proposal.
	IP Review	Not used.
	Negotiation	Not used.
	Notepad	View the notepad notes for the institute proposal.
	Medusa	Opens the Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Sort proposals	Opens Sort Window and allows for sorting by multiple column contents—either descending or ascending
	Search for proposal	Search institute proposal.
	Save	Save search results in csv, txt, htm or xls formats.
	Close	Close the Institute Proposal module.

## Institute Proposal Toolbar

This is the toolbar displayed when viewing an institute proposal after selecting it on the search screen. Some of these buttons will be grayed out because they are for ORPA use only.



Button	Button Name	Action
	Next Proposal	View next institute proposal on search results list.
	Previous Proposal	View previous institute proposal on search results list.
	Print Proposal Notice	Mainly ORPA use. Print Proposal Notice.
	Notepad	View the notepad notes for the institute proposal.
	Medusa	Opens Medusa—Award, Institute Proposal and Development Proposal Links Window to show relationships between proposals, institute proposals and awards
	Send Mail Notification	Sends an email to notify individuals that you select.
	Save	ORPA use only. Saves sequence.
	Close	Close the Institute Proposal.

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