Part 1 – Proposal Creation

Lesson 1: Navigating Coeus & Getting Started

**Exercise 1 - Logging into Coeus**

Login with Train ID assigned / Password = osp

**Exercise 2 - Coeus Help Links**

Grants.Gov  
Coeus Support and Training

**Exercise 3 - Menu Bar Links**

<table>
<thead>
<tr>
<th>All Proposals</th>
<th>All Proposals for your department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposals In Progress</td>
<td>Proposals in Progress for your department</td>
</tr>
<tr>
<td>Create New Proposal</td>
<td>Access to create a new proposal</td>
</tr>
<tr>
<td>Proposal Search</td>
<td>How to search the Coeus database for proposals</td>
</tr>
<tr>
<td>Grants.Gov Opportunity Search</td>
<td>How to search grants.gov for a valid opportunity</td>
</tr>
</tbody>
</table>

**Exercise 3 - Searching Development Proposals (Proposal Search)**

- Search for all proposals: Asterisk (*) in the Proposal # field
- Search by Title: *proposal*
- Search for Proposal with a Deadline date between: Between 09/01/14 and 09/30/14

Ordering Results: Ascending/Descending Order

Lesson 2 - Creating a New Proposal (Create New Proposal)

**Exercise 1 - Creating a New Proposal Shell**

To create a new Development Proposal record in CoeusLite you need to enter a few basic details about the proposal in order to create and save the proposal record. Once the proposal record is created, it can be updated and modified at any time and the remaining fields in the General Info Screen can be completed. General Info Screen is the default view upon opening a proposal. Users can select GENERAL INFO link from the left navigation bar to return to this screen at any time.

<table>
<thead>
<tr>
<th>Proposal Type</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Type</td>
<td>Organized Research</td>
</tr>
<tr>
<td>Start Date:</td>
<td>09/01/2015</td>
</tr>
<tr>
<td>End Date</td>
<td>08/31/2018</td>
</tr>
<tr>
<td>Agency/Sponsor</td>
<td>NCI National Cancer Institute</td>
</tr>
<tr>
<td>Title</td>
<td>Training Proposal-XX (initials)</td>
</tr>
</tbody>
</table>
Exercise 2 - Completing the General Info (reference chart of required fields)

Once a Proposal record is initiated, the remaining fields in the General Info Screen can be completed; this section contains the basic attributes of the Proposal.

<table>
<thead>
<tr>
<th>General Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prime Sponsor:</td>
</tr>
<tr>
<td>Proposal Deadline Date</td>
</tr>
<tr>
<td>Deadline Date designation</td>
</tr>
<tr>
<td>NSF Code:</td>
</tr>
<tr>
<td>Anticipated Award Type</td>
</tr>
<tr>
<td>Proposal in Response</td>
</tr>
<tr>
<td>Funding Opportunity Number:</td>
</tr>
<tr>
<td>Subcontract Check Box</td>
</tr>
</tbody>
</table>

Lesson 3 - Connecting to Grants.gov (Grants.gov selection)

Coeus has the ability to submit proposals created in the Proposal Development module directly to Grants.gov, system to system (S2S). Once the opportunity is known, the proposal record can be connected to Grants.gov and the forms and validations are incorporated in the proposal record.

Exercise 1 - Connecting to Grants.gov

Connect to Grants.gov
Use Funding Opportunity Number - PA-C-R01
Print/Preview Instructions
Review Forms Included in the Package

Lesson 4 - Assign Proposal Roles (Proposal Roles Navigation)

The Proposal Creator/Aggregator for a given proposal automatically has the rights to modify all parts of the proposal by default. In addition, Department Aggregators will have access to modify any proposal created in their department(s). There are times, however, when proposal work needs to be distributed to other users, i.e. Investigators need to be granted access to the proposal in order to certify their proposal. The aggregator(s) for the proposal may grant access to any other users who may collaborate on the development of the proposal by assigning users to specific roles on the proposal. Any roles assigned to a user apply only to the current proposal they are assigned to, NOT all proposals for the department.

Exercise 1 - Assigning Roles to a Proposal

Add a training ID to the Aggregator Role
Add Christopher Moore to the Brown Certifier Role
Add a training ID to Viewer Role
Remove Aggregator Role
Lesson 5 – Adding Proposal Details

**Exercise 1 - Organization Screen**

The **Organization Section** contains the contact information for Brown University, other Organizations and Performing locations/sites for the project. Each Organization or Performance Site entry is divided into three parts: Organization/Performance Site Location; Address; and Cong Dist.

<table>
<thead>
<tr>
<th>Add Organization:</th>
<th>Select Other Organization = Miriam Hospital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Organization:</td>
<td>Select Performance Site = Field Site</td>
</tr>
</tbody>
</table>

**Exercise 2 - Investigator /Key Person Section**

The **Investigators/ Key Persons Section** identifies the Principal Investigator (PI), Multiple Investigators, Co-Investigators, and Key Personnel of the project. Effort over the entire project period is entered for each Individual and Investigator Certifications are completed for those who require it.

<table>
<thead>
<tr>
<th>Add Principal Investigator</th>
<th>Jennifer Quinn</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Co-Investigator</td>
<td>Chris Moore</td>
</tr>
<tr>
<td>Add Key Person- Statistician</td>
<td>Patrice Carroll</td>
</tr>
<tr>
<td>Add Key Person-Subcontract PI</td>
<td>Laura Stroud</td>
</tr>
</tbody>
</table>

**Exercise 3 - Updating Proposal Personnel**

If information for the Investigators/Key People is not correct or degree information needs to be added to the proposal, the corrections can be made within this screen.

Select Laura Stroud, Click Details link and edit record; Add Degree information (PhD, 2008)

**Exercise 4 - Special Review**

Information about Human Research Participants and Animal Laboratory Care is entered in the **Special Review Section**. These are the only two Institutional Issues that should be entered in this tab. You should only complete this information if Human Research Participants and/or laboratory Animals are being used in the proposal. If none of these are present in the proposal, then omit this section.

Add Special Review: Human Research Participants; Pending

**Exercise 5 - Layman’s Abstract (Brown Abstract from the PSAF)**

This section of Coeus is mainly used to add Brown’s proposal abstract to the proposal record - **Layman Abstract**. It is also used to add the following information for NSF Grants.gov submissions: Suggested Reviewers, Reviewers Not to Include, Deviation Authorization. There are various abstract sections that are named with titles that relate to some of the Grants.gov categories. The **Abstract section** is NOT used to populate the Grants.gov forms with the exception of NSF Grants.gov submissions.

Add Laymen Abstract; Enter Text- “Testing”

**Exercise 6 - Other Sections**

The **Others Section** captures data needed for Brown University’s reporting requirements.

**Country Fields 1-4:** No selection is necessary, unless there is international collaboration; then select country from the list and answer yes to the corresponding question.

<table>
<thead>
<tr>
<th>Number of Undergrad Students</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSPIRES field is for NASA Project</td>
<td></td>
</tr>
</tbody>
</table>
**Subcontract PI** fields are for names of the Prime PIs on subs being issued to Brown

**Exercise 7 - Answering Yes/No Questions**

Coeus has a series of compliance questions that need to be answered in the **Yes/No Questions section** of the Proposal Development record. These questions relate to compliance issues required by University.

Enter the YNQ Section
Use the handout to answer the Brown Questions
Part 2 – Budget Creation

Coeus has a Budget tool that stores all approved *Facilities and Administrative Rates, Employee Benefit Rates, & Inflation Rates* to automate those calculations when you add your cost elements.

You can create an initial budget that includes the period of performance and the detailed personnel / non-personnel cost elements. Coeus then will automatically calculate inflation and salary increases as well as overhead.

Scenario Overview

We are submitting an R01 Proposal to the National Institutes of Health for a 3 year budget period (09/01/2015 – 08/31/2018)

The following will be included in the budget:

<table>
<thead>
<tr>
<th>Personnel Items:</th>
<th>Non-Personnel Items:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PI (Quinn) will work during both the Academic and Summer months on this proposal</td>
<td>• 1 Consultant</td>
</tr>
<tr>
<td>• Co-Investigator (Moore) will work during the Academic month on this proposal</td>
<td>• Equipment</td>
</tr>
<tr>
<td>• 1 Exempt Research/Technical Staff (Carroll)</td>
<td>• Travel</td>
</tr>
<tr>
<td>• 1 Grad R/A – TBA will work during both the Academic and Summer months on this proposal</td>
<td>• Supplies</td>
</tr>
<tr>
<td></td>
<td>• Grad Health Fee</td>
</tr>
<tr>
<td></td>
<td>• Subcontract to Miriam Hospital</td>
</tr>
</tbody>
</table>

Lesson 1 – Starting the Budget

*Exercise 1 – Sync Budget Persons*

This feature prompts you to sync the Proposal Personnel in the Investigators/Key Persons Section to the Budget Personnel Section in the Budget.

The "Sync Budget Persons" function tells the system to automatically populate the Budget Personnel Section with the Investigators and the Key Personnel that were added to Investigators/Key Persons Section.

You can add additional personnel as necessary when you update the Budget Personnel Section.

Before you Sync the Budget Persons, you must select the appropriate Appointment Type for each individual listed in this window.

The Appointment Type indicates the duration (period of time) the individual is employed for at the University.

→ Complete the Sync Budget Persons Section as follows:

<table>
<thead>
<tr>
<th>NAME</th>
<th>APPOINTMENT TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quinn – PI</td>
<td>10 Month</td>
</tr>
<tr>
<td>Moore Co-Investigator</td>
<td>9 Month</td>
</tr>
<tr>
<td>Carroll – Statistician</td>
<td>Reg Employee</td>
</tr>
<tr>
<td>Stroud – Sub-Contractor PI</td>
<td>TMP</td>
</tr>
</tbody>
</table>
**Exercise 2 - Navigating CoeusLite Budget Section**

When you enter the **Budget Section**, the left hand side Navigation Panel becomes budget specific. The Budget Navigation Panel contains numerous sections where information about the project budget is entered.

*The information entered in the Budget Sections is used to populate the Grants.gov forms necessary for submitting proposals electronically or the Sponsor and Generic forms available for paper submissions and also meet internal reporting requirements.*

Use the Navigation Panel Buttons to navigate your budget and proposal sections. Do not use your Browser’s “Back” or “Forward” buttons - these functions are not supported for use in navigation in CoeusLite.

**Exercise 3 - Overview of the Budget Summary Section**

The **Budget Summary Section** provides a summary view of the budget; including the proposal dates, the direct and indirect costs, and the overhead rate type for the project.

Many fields on the **Budget Summary Section** are read-only and are populated as you begin entering the details of the budget. There are a few fields in this section, however, that require editing or verification that the data was populated appropriately.

**Lesson 2 – Completing the Budget Personnel Section**

**Budget Personnel Section** can be thought of as a "shopping list of personnel" which includes salary and appointment information. Coeus will inflate annual salary increases and then calculate direct and indirect costs based on the dates of performance and % of Effort.

You will add all named and TBA personnel in the proposal to this section. Any investigators and the key personnel you added under **Investigators/Key Persons Section** will automatically populate the **Budget Personnel Section** when your budget is first created. You can add additional personnel as necessary at any point in the budget development process.

The **Budget Personnel Section** contains information (i.e. Appointment Type, Base Salary, Effective Date of last salary increase, and Base Salary by Periods fields) about each individual that is used when calculating budget salary amounts. The **Appointment Type, Effective Date** of last salary increase and **Calc Base** salary are used to calculate and inflate the individual’s salary for each period.

→ Complete the Budget Personnel Section as follows:

<table>
<thead>
<tr>
<th>NAME</th>
<th>APPOINTMENT TYPE</th>
<th>EFF. DATE</th>
<th>BASE SALARY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stroud</td>
<td>TMP</td>
<td>09/01/2015</td>
<td>0</td>
</tr>
<tr>
<td>Quinn</td>
<td>10 month</td>
<td>07/01/2015</td>
<td>$140,000</td>
</tr>
<tr>
<td>Moore</td>
<td>9 Month</td>
<td>07/01/2015</td>
<td>$100,000</td>
</tr>
<tr>
<td>Carroll</td>
<td>Reg Employee</td>
<td>07/01/2015</td>
<td>$64,000</td>
</tr>
<tr>
<td>TBA – Grad RA 1</td>
<td>9 month</td>
<td>09/01/2015</td>
<td>$20,000</td>
</tr>
</tbody>
</table>
Lesson 3 – Rates

Coeus stores various university approved rates that are needed for budget development, i.e. **F&A (Facilities and Administrative)**, **EB (Employee Benefits)** and **Inflation**. Rates are set for each fiscal year and Rates are applied to cost elements within the budget.

Negotiated/pre-determined F&A, EB, and inflation rates are set up in Coeus for each fiscal year. These rates are applied to budgeted costs. Each Budget Element is mapped to the negotiated/pre-determined rates and Coeus will automatically calculate F&A, fringe, and inflation when applicable.

To be sure that your proposal is using the most up-to-date indirect, employee benefit, and inflation rates; you must synchronize (Sync) your Proposal Rates table to the Institute Rates table. If you are using a copied proposal, this action is imperative; a newly generated proposal’s rates should be valid, but a copied proposal may have old rates that require synchronizing.

→ Enter the Rates Section to review the rates currently stored in the system.

Lesson 4 – Entering Period 1 Budget Items

**Exercise 1 - Enter Personnel Budget Items**

Personnel Budget Items within a budget describe who will be paid out of the award if the proposal is funded. Coeus allows you to add named persons (Investigators, Key Persons) as well as persons to be named (TBA Postdocs, TBA Graduate Research Assistants, etc.) if the proposal is funded.

To add personnel to the budget, the **Budget Personnel Section** must be complete (See topic – **Completing the Budget Personnel Section**).

The individuals entered in the **Budget Personnel Section** are then assigned to salary budget items (personnel cost elements) in the selected budget periods.

→ Enter the Budget Personnel Section and complete it as follows:

<table>
<thead>
<tr>
<th>PERSON</th>
<th>SALARY TYPE</th>
<th>% EFFORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quinn</td>
<td>Faculty Salary - Academic</td>
<td>5.00</td>
</tr>
<tr>
<td>Quinn</td>
<td>Faculty Salary - Summer</td>
<td>10.00</td>
</tr>
<tr>
<td>Moore</td>
<td>Faculty Salary - Academic</td>
<td>10.00</td>
</tr>
<tr>
<td>Carroll</td>
<td>Exempt Research/Technical Staff (FT Rate)</td>
<td>40.00</td>
</tr>
<tr>
<td>TBA Grad RA 1</td>
<td>Grad R/A Academic Year (No FB)</td>
<td>100.00</td>
</tr>
<tr>
<td>TBA Grad RA 1</td>
<td>Grad R/A Summer (PT Rate)</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Exercise 2 - Enter Non-Personnel Budget Items**

Non-Personnel Budget Items within a budget describe what goods or services will be purchased out of the award funded to the proposal. Such items include equipment, maintenance contracts, travel expenses, tuition fees, supplies, and other operating expenses.

As described earlier, CoeusLite has several sections that can be used to add non-personnel budget items. These sections are:

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Travel</th>
<th>Participant/Trainee</th>
<th>Other Direct Costs</th>
</tr>
</thead>
</table>

Enter the following Non-Personnel Budget Items in your Budget:

<table>
<thead>
<tr>
<th>BUDGET ITEM</th>
<th>DESCRIPTION</th>
<th>QNTY</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>Centrifuge</td>
<td>1</td>
<td>$6,000.00</td>
</tr>
<tr>
<td>Travel Domestic (No Inflation)</td>
<td>Conference</td>
<td></td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Supplies - Research</td>
<td>Research Supplies</td>
<td></td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Grad Health Fee</td>
<td></td>
<td></td>
<td>$800.00</td>
</tr>
</tbody>
</table>

Lesson 5 - Generating Remaining Budget Periods

Once all of your Budget Items are added to the Period 1 Budget, Coeus has a function to generate the remaining budget periods. The budget items are copied into each period and inflation is applied, if applicable, within each budget period.

The Generating all Periods function can be done only once per budget version; therefore, before you generate the remaining budget periods, you should review the Period 1 budget for accuracy.

Lesson 6 - Uploading Subaward Budgets

Subaward Budget Section has been added to the Budget Section of CoeusLite.

> Click on the Sub Award Budget Link
> Upload Sub Award Budget File

Lesson 7 - Modifying Budget Items and Applying Budget Items to Future Periods

Once your budget periods have been generated with using the Period 1 budget as the base, you can further modify a specific budget period.

There are several adjustments that can be made to a selected budget period:

1. Editing a Non-Personnel Budget Item
2. Editing a Personnel Budget Item
3. Add a Budget Item
4. Delete a Budget Item

**Exercise 1 - EDIT the following budget items:**

**Budget Period 2**

> Change the % Effort for Quinn during the Summer Period to 20.00%

**Exercise 2 - DELETE the following budget items:**

**Budget Period 3**

> Delete Grad RA 1 Summer

**Exercise 3 - ADD the following budget items:**

**Budget Period 1**

> Professional Services - $3,000.00

**Exercise 4 - APPLY the following budget item to future periods:**

> Professional Services - $3,000.00 to all 3 periods
Lesson 8 – Creating Modular Budget

Modular Budgets, one of the two NIH budget components, are applicable to certain research grant applications from domestic organizations requesting $250,000 or less per year for direct costs. International organizations and others that do not fall under this definition and they should use the detailed budget forms. Note consortium/contractual F&A costs are not factored into the direct cost limit. They may be requested in addition to the $250,000 limit. Modular budgets are simplified; therefore, detailed categorical information is not to be submitted with the application. The modular budget is only applicable to R01, R03, R15, R21, and R34 applications.

- In the Budget Summary Section, check the Modular Budget Checkbox.
- Then click on the Modular Budget link in the left hand side navigation panel and sync with the Detailed Budget.

Lesson 9 – Creating an Alternate Budget Version and Finalizing the Budget

You can create as many budget versions on a proposal as needed. A New budget version can be created or you can make a copy of a previously created budget version and then make changes to it according to your needs.

- Click on the Budget Versions link located in the left hand side Navigation Panel to Copy or Create a New Budget Version

Lesson 10 – Printing Coeus Budget Forms

There are a variety of Budget forms that can be printed from CoeusLite. The Budget section contains 4 budget forms that look at different slices of the budget, while the Grants.gov window contains the required Budget forms available for each particular Grants.gov submission.

CoeusLite gives you the option to print the following Budget Forms:
- Budget Summary by Period
- Cost Sharing Summary by Period
- Cumulative Budget
- Industrial Budget by Period

When you print the forms from CoeusLite, a PDF document will be generated. Then you can print a hard copy from Adobe.

- Click on the Print link located in the left hand side Navigation Panel to see and print the available Coeus Budget Forms

Lesson 11 – Uploading Attachments

The Upload Attachments link allows you to upload documents to your proposal from your computer desktop. The Narrative Types currently available in Coeus contain a standard set of narrative types for all proposals; specific Grants.gov narrative types based on downloaded opportunity; and a few Brown specific narrative types to track proposal information that does not need to get sent to the sponsor.

The attachment type drop down list is filtered based on the Grants.gov opportunity selected in the proposal. If not opportunity is selected, a standard set of narrative types will be listed. If an opportunity is selected, list of narrative types available will be based on the forms included in the opportunity.

The Upload Attachments Section is where the proposal related documents are stored in Coeus. There are 3 tabs within this section where the appropriate attachments should be uploaded under.
- **Upload Proposal Attachments** - these documents or files are required as defined by the sponsor opportunity instructions and their general submission guidelines
- **Upload Personnel Attachments** - these are person-specific files (Biosketches, Current and Pending, etc)
- **Upload Institutional Attachments** - these documents are to be reviewed by Brown only. These files will not be submitted to the sponsor (i.e. Cost sharing approval)

**Exercise 1 - Uploading Proposal Attachments**
- Upload Budget Justification
- Upload PHS_ResearchPlan_ResearchStrategy
- Upload Narrative
- Other [Foreign_Justification]

**Exercise 2 - Uploading Personnel Attachments**
- Upload Biosketch for PI – Quinn
- Upload Biosketch for Co-Investigator – Moore
- Upload Biosketches for Carroll and Stroud
Part 3 - Proposal Finalization and Approval

Before you can submit the proposal for approval routing you will need to COMPLETE it. To finalize the proposal, you will need to finalize and mark and the attachments and budget as complete, certify the investigators, include all required Grants.gov forms, validate the proposal, which will include verifying that you have entered the necessary data for institute and sponsor-specific criteria.

Lesson 1 - Investigator Certification – Proxy Certification Process

All Principal Investigators, Multi-Investigators, and Co-Investigators designated in the Investigators/Key Persons Section need to answer and sign the required certifications. Certifying investigators involves answering a series of questions in an electronic certificate in Coeus which will then be printed, signed by the Investigators, and then forwarded to the OSP office to be placed in the Proposal file. The electronic certification must be completed in order for the proposal to be submitted for approvals and then to the Sponsor.

→ Click on the Investigators / Key Persons Link
→ Click on the [Certify] button
→ Complete the Certification Questions and click on the [Save] button

Lesson 2: Questionnaire – Additional Investigators

→ Grants.gov Questions
→ NIH Additional Investigator(s):
  o Add Chris Moore as Brown Investigator
  o Add Laura Stroud as Sub PI

Lesson 3: Finalize Proposal

→ Walk through your proposal record to be sure all sections are complete
→ Check Grants.gov forms - Include the RR Subaward Budget form
→ Mark your Narrative as Complete
→ Mark you Budget as complete

Lesson 4: Brown's Internal Validations

When you run the Coeus Validation check, it will notify you if you have missed or failed to complete required elements of your proposal. The validations review your proposal data and will check Coeus specific, Brown specific, and in some instances, sponsor specific requirements. In addition, for eligible electronic S2S submissions to Grants.gov via Coeus, you can validate the proposal with Grants.gov. This validation determines whether or not all your sponsor's Grants.gov required elements for the selected opportunity have been entered.

Exercise 1 - Budget Validations
→ Run Brown's Budget Validations (Action - Validations)
→ Add Tuition CE - A071560 - $10,000
→ Apply the line items to Later periods

Exercise 2 - Run Proposal Validations
→ Run Brown's Internal Validations (Action - Validations)
→ Add Deadline Date
→ Add 2 Grad Students in the Other Tab
Lesson 5: Grants.gov Validations

→ Run Grants.gov validations

Lesson 6: Printing the Proposal

This section will explain how to print various forms from Coeus: Brown Custom forms, Grants.gov forms and Non-grants.gov forms.

→ Print Budget Forms
→ Print Custom Forms
→ Print Grants.gov Forms

Lesson 7: Submit for Routing

Routing Maps—Coeus electronically routes your proposal for the necessary University approvals based on your department's business processes. Your proposal must past the required validations before you can route the proposal. Once the proposal passes all the Coeus and Grants.gov validations successfully it is ready to be submitted for approvals through the Coeus electronic routing system.

Approving or Rejecting—Coeus approval routing and business rules simulate the Department's and University's business practices for the proposal review approval process. When a proposal is submitted for routing, an email is sent to the next individual on the approval list, as well as an electronic notification in Coeus. Once the proposal has successfully reached final approval stage the proposal is submitted to the Sponsor. This section will go over the CoeusLite Inbox functions and approving or rejecting a proposal.

→ View Approval Maps

Lesson 8: Approvals

→ Reject the Proposal
→ Re-submit / Approve the Proposal

Lesson 9: Other Proposal Functions

Exercise 1 - Copy Proposal

The copy feature in Coeus allows you to copy an existing proposal to create a new proposal. This is an excellent way to save time and effort when submitting a proposal that is very similar to a Development Proposal record that has already been created. Instead of having to create a brand new proposal, entering all of the details, the budget and the narratives, one can copy an existing proposal with all of these modules and make additions and changes as desired.

→ Copy submitted proposal

Exercise 2 - Email

→ Using Coeus to send an Email

Exercise 3 - Rolodex

Create a non-Institute investigator, performing site, contact, or key person Rolodex.
Exercise 4 - Delete Proposal
Coeus has a new functionality that allows a user to **DELETE** Proposals that are “In Progress.” Only an Individual who is an Aggregator on a Proposal may delete that Proposal.

→ Delete proposal

Exercise 5 - INBOX
Your **CoeusLite** Inbox functions like a mailbox and serves as a central location where you can access a listing of proposals that require your attention; i.e. proposals in need of an approval, notifications about proposals, etc.
For all proposals that you require your attention, you will be notified by email to your Brown email account.

→ How to Open inbox and message

Exercise 6 - Delete Lock
CoeusLite allows two users to access the same Development Proposal record at once but they must be in different locations: Proposal Details, and Budget. If you try to enter a section that is being modified by another user, you will receive a message that the proposal has been locked and is being used by another user. You must wait to enter that particular session until the other user has closed out of the record.

Exercise 7 - Logout