

Coeus Premium: Remote Work Best Practices for Grant Proposals

As we continue to navigate University-wide remote working, RAIS has developed a best practices guide to help those working on grant proposals avoid common errors, assess & fix minor issues, and continue a seamless remote working experience.

For all grant proposal work, use Coeus Premium since many functions specific to proposal work are *not* available in Coeus Lite.

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Logging in:

Be sure to always log into Coeus Premium directly using [this web link](#) and not from a previously downloaded version or Coeus shortcut present on your desktop. This will ensure that you are always using the most up-to-date version of Coeus Premium.

For Coeus Premium you do not need to use Brown's Virtual Private Network (VPN), but if you seem to be encountering errors on your own home network, you can always utilize the VPN if you believe it may assist in some way.

Java 8 and Oracle Accounts:

Currently the **only** version of Java compatible with Coeus Premium is Java 8. Be sure to use the correct, compatible version of Java.

See the following reference materials and instructions for working in Java 8:

- To check and confirm which version (if any) of Java is on your computer, click [here](#);
 - Ensure that you have an [Oracle account](#), as this is required by Oracle in order to download Java;
 - [Install/reinstall Java 8](#), if your computer was recently serviced by IT or if you received a new computer.
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Diagnosing Most Common Errors/Issues in Coeus:

Since we are all remote, the most common issues will begin with your own network and your own computer and may not be a Coeus error. The best practice steps to diagnosing a Coeus issue remotely are as follows:

Error Messages

- Fully read the error message for the issue you are encountering.
 - Sometimes the error message provides clues or language that point to the area that needs to be addressed.
 - RAIS recommends taking a screenshot of the error message encountered to help diagnose the issue, if their help is needed.

Unknown Issue with no error message

- If there is no specific error message being generated by Coeus, but there seems to be some issue:

- First, log out of Coeus.
 - Do not use an icon/shortcut on your desktop to log back into Coeus. Always use this [URL](#) noted in the 'Logging In' section on p. 2 of this guide.
- Second, check the internet connection on your own computer. Sometimes your own connection has had a glitch or intermittent disconnect that caused an issue in the software programs you were running at the time.
 - You may need to check the router in your own home to see if your internet signal is steady.
 - Check if any other devices (phone, tv, ipad/tablet, etc.) connected to your home internet are also experiencing connectivity issues.
 - If you are experiencing home internet issues, please contact your Internet Service Provider (ISP) to further diagnose and assist.
- Third, check with colleagues in your department (via phone/email/GChat) who have the same Coeus access role(s) to see if they are encountering the same issue(s).
 - If several people are encountering the same error, there may be a system-wide or department-wide issue, although these are rare.
 - If several people are experiencing the same thing, please submit a [helpdesk ticket](#) reporting the potential system-wide or department-wide issue.
 - In the ticket, make sure to include a screenshot of the error message, include steps taken that generate the error, and usernames of others experiencing the same issue in the ticket notes.
- Lastly, sometimes rebooting your computer and then logging back into Coeus clears the issue.

Record is locked or locked repeatedly

- If a pop-up message appears stating that the record is locked and that someone else is using it, contact that party to exit the file so you can work on it. If that person is unavailable (on vacation, etc.) enter a [helpdesk ticket](#) so RAIS can clear the record lock.
 - Do not enter the record and clear your own record lock, as you will create a loop that will lock you out of your record repeatedly.
 - We recommend checking in with colleagues who may be working in the record at the same time to better coordinate and prevent locks on records.
 - **Note:** Multiple persons attempting to work in the same section in 'Edit' mode at the same time can cause repeated record locks and issues.

I cannot upload an NIH ASSIST, NSF or Workspace final proposal PDF copy to my PD

record in Coeus. I am getting an error when trying to upload or it just never uploads the file.

1. First, ensure that you have an Aggregator role on that proposal in order to be able to edit and upload documents.
 2. Ask another Aggregator on that record to upload your PDF proposal to see if they can do so, and if not, try the next step.
 3. Open the PDF document and when in Adobe, use the 'Print to PDF' function to print and Save the file. This sometimes 'flattens' the file making it uploadable to Coeus.
 4. If this still does not work, you will need to split your final proposal PDF into multiple PDFs and upload it to the Narratives section of Coeus as separate PDFs with labels of which section is which (recommend page numbers and title).
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Hierarchy Records- Creating a Proposal Family

Your best source when creating a hierarchy, or diagnosing an issue is to be sure to follow the steps outlined in the brief [Proposal Hierarchy Guide](#). *(Please also note that this guide addresses Proposal Hierarchies in Coeus Premium as Hierarchies cannot be created or properly worked on in Lite.)*

We recommend the three C's as a best practice:
Create, Collaborate, Communicate

Create

- After creating the record following the [Coeus Premium Guide](#), be sure that your records are linked together to sync properly. Doing this from the beginning and checking your work ensures proper syncing of parent/child records along the way.
- The most common error/issue that Coeus Helpdesk receives is lack of linking records and/or lack of syncing records when changes are made across departments/records.

Collaborate

- Look to the lead/parent department to coordinate the overall hierarchy. Parent and child departments are the administrative backup for each other and should collaborate to ensure administrative coverage on all records in the hierarchy until the proposal submission is complete.
- Be sure to check the [Hierarchy Guide](#) for roles you may wish to provide on each proposal record for cross-department collaboration.

Communicate

- All departments in the hierarchy family should be in continual communication with each other through the process of creating, routing for approvals, and point of submission to sponsor by OSP/BMRA.
 - This ensures a smooth process to make corrections to records on the parent or child side, to assess issues that might be occurring due to something done (or not yet done) in a parent or child record, and to be available for OSP/BMRA should there be any questions up until submission point.

Budgets- Most Common Errors/Issues

Something is not calculating correctly in the budget

Something is blank, zero'd out or missing from the *PDF print version* of the budget

- The possible solution for these two common issues is the same:
 - Sync the rates table and save the record.

Steps:

- From the Budget > Edit menu > Rates > Sync > Save
 - Be sure to save after syncing to ensure changes get made and saved.
- Sometimes resyncing the rates corrects any calculating issues and other budget errors.

Other budget issues?

The most common issues to avoid are:

- Incorrect dates added to the lines in the Budget Persons Window for academic and summer salary.
- Salary inflation anniversary dollars inputted incorrectly in the Budget Person's table for the persons appointment.
- Incorrect numbers from the NIH Cap worksheet being used.
 - [See OSP](#) regarding this, as they maintain this Cap sheet and can assist further.
- Line items that have not been properly removed from one period of the budget.

In the types of instances listed above, and others like them, please:

- Consult the [Coeus Premium Guide](#).
 - Use CTRL + F buttons to utilize the quick search function within the PDF.
- Ask a colleague (i.e., someone else within your department's research administration staff) to double-check or review your budget.
- Discuss the structure of your budget with your OSP/BMRA pre-award contact to make sure that you structured it correctly according to the sponsor's funding opportunity announcement (FOA), especially if you are unsure about budgeting guidance or restrictions provided in the sponsor's FOA.

If the above still have not resolved the issue, be sure to submit a ticket to Coeus Helpdesk via the CIS IT Service Center [ticketing page](#). In the ticket, make sure to include: (a) screenshots; (b) steps taken; and (c) if applicable, include usernames of others experiencing the same issue to the ticket notes.

Best Practices for Using Coeus Helpdesk

To ensure you get the most timely assistance, please submit the proper type of [Coeus Helpdesk ticket](#) (only OSP/BMRA central office staff should email the coeus_help box directly).

When you click the link for the [Coeus Helpdesk](#), click the [Log in](#) button on that homepage, otherwise your ticket may not be submitted correctly.

Choosing the best ticket type to choose for your request

Coeus Technical help (errors/issues)

- This is in the dropdown selection list as: SUPPORT: Coeus/InfoEd (NOT for Access request) shown here:

Request Subject *

Coeus Proposal 123456 Error in Narratives

Select a request type * ?

Select...

IT HELP Request

ACCESS Request [choose sub-category]

SUPPORT: Coeus/InfoEd (NOT for Access request)

WORKDAY Ticket (Help & Reports)

RAIS Report Request

Business Service Change Request

- Then proceed to fill out the rest of the ticket information needed so support technicians can best assist you.

User Roles (changes, additions, or deactivation of a person or role(s) in Coeus)

- This is in the dropdown selection list as: ACCESS Request [choose sub-category] shown here:

Request Subject *

Coeus roles for new user John Doe, department of xxxxxxxx

Select a request type * ?

Select...

IT HELP Request

ACCESS Request [choose sub-category]

SUPPORT: Coeus/InfoEd (NOT for Access request)

WORKDAY Ticket (Help & Reports)

RAIS Report Request

Business Service Change Request

- Next, choose the Subcategory: COEUS Access Request, from the sublist.
- Then proceed to fill out the rest of the ticket information to request all the roles needed or all roles that need to be removed. See Important Note below.
- **IMPORTANT NOTE:** ACCESS Request tickets are also required if someone leaves your department and needs to have roles removed and/or have their account in your department deactivated. No roles or access is removed for this person until a department manager submits a request for removal. As a best practice, this step should always be taken when someone transfers, resigns or is terminated and you believe they had Coeus access.

Sponsor, Organization or Rolodex entry requests

- This is in the dropdown selection list as: SUPPORT: Coeus/InfoEd (NOT for Access request) shown here:

New Sponsor for proposal- XYZ Corporation

Select a request type * ?
 SUPPORT: Coeus/InfoEd (NOT for Access request)

Your Name *
 Andrea Mucci

Your Email
 andrea_mucci@brown.edu

Phone Number *
 e.g.: ###-###-####

Select Issue Type *
 Coeus Issue InfoEd Issue

Is this a proposal technical/error issue? *
 Sponsor/Organization requests- click "No"
 Yes No

Is this a Sponsor/Organization request only? *
 Sponsor Organization Rolodex entry only No

- Choose the Issue Type “Coeus Issue,” then choose “No” to the technical/error question to indicate you are requesting a sponsor, organization or rolodex entry.
- **IMPORTANT NOTE:** Be sure to include the required information if this is an Organization request. There is a link provided in the ticket to the required information right after the last question shown in the screenshot above, requesting the following information to setup an Organization in Coeus:

- Organization Name (City or State Organizations should begin with “City of” or “State of”)
- Contact Address
- Address
- County
- Congressional District
- DUNS
- Type of Organization (e.g., Federal, For-Profit, etc)
- Provide the above information in the notes section of the ticket and click Submit.

Submitting Your Ticket

- Always be sure to submit the ticket by clicking the Submit button, as just completing the ticket does not submit it.



- You will then receive an automated email reply with your ticket number.
 - If you have further questions regarding the status of the open ticket, reply in that email or see below for guidance on checking ticket status.
 - Please do not create another ticket to check on the status of the ticket already submitted

Checking the Status of your ticket

- The status of all your tickets (past or present) can be viewed by clicking “Requests” when you are logged into the [Coeus Helpdesk](#):



- Check the ‘Open Requests’ tab to track the status of any open ticket.

