# Coeus Release Update

Coeus Release 4.5.1 P2
January 2014

BROWN
RESEARCH

# Agenda

- → Compatible Java Versions
- → Java Certificate Message
- → User Attached S2S Forms Tool
- → Salary Anniversary Date
- → Biosketch Validation
- → CoeusLite – Routing History for ‘Rejected’ Proposals
- → CoeusLite – PI Narrative Display
- → Rolodex
- → List of ALL Updated/New Grants.gov Forms (FORMS-C)
- → Question and Answers

# Compatible Versions of Java

# Compatible Versions of Java

- *New* - Coeus is now compatible with Java version 1.7

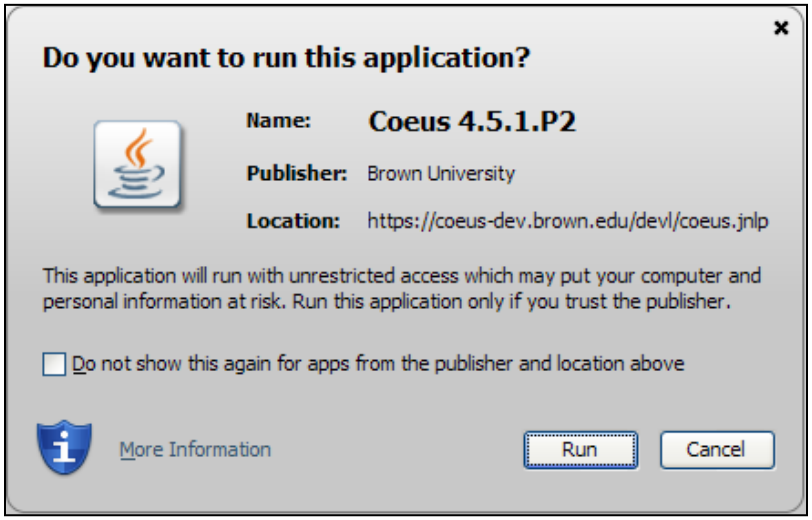
- Also compatible with Java version 1.6. You do not need to upgrade to 1.7.

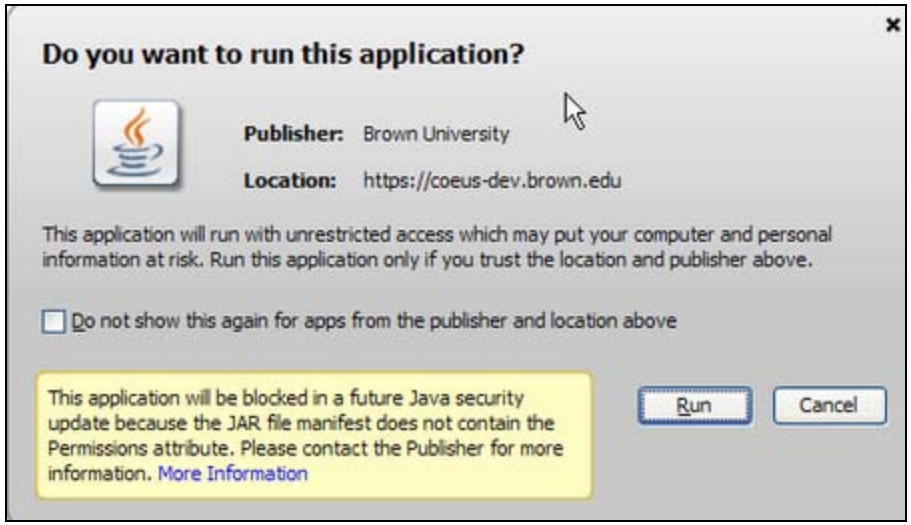
- Mac Users – Please let us know if you have any trouble accessing Coeus from a Mac.

# Java Certificate Message

# Java Certificate Message

- When you launch Coeus Premium you may come across the following Certificate Messages:

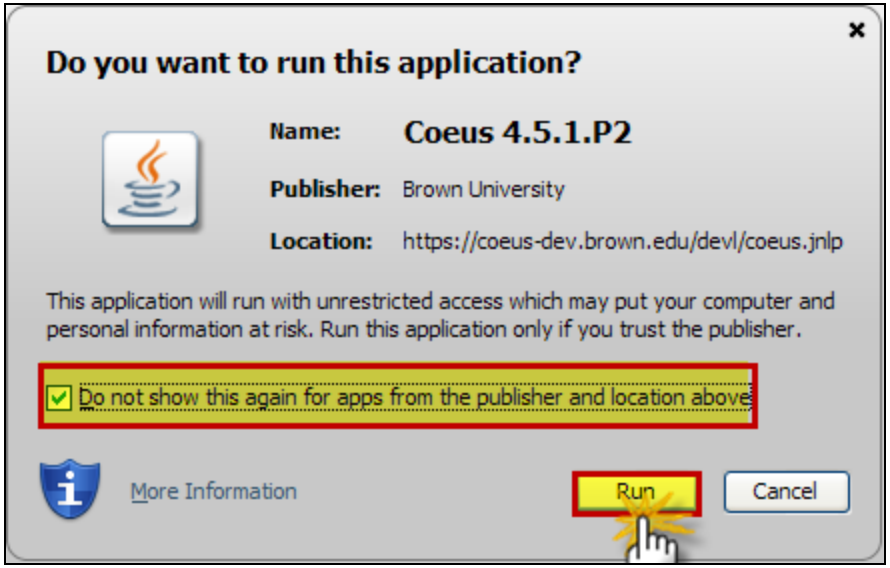


# Java Certificate Message

- OSP has verified, and it is safe to click on the [**Run**] button in order to proceed with accessing Coeus Premium.

- To avoid receiving this message in the future, you can select the checkbox next to *'Do not show this again for apps from the publisher and location above'* prior to clicking on the[**Run**] button.



# PROPOSAL DEVELOPMENT MODULE UPDATES

NEW

NEW

# User Attached S2S Forms Tool

# Overview

- This NEW tool enables users to upload individual (Unstitched) Adobe forms into posted Adobe Opportunities to meet submission requirements when the target form(s) is/are not mapped for Coeus submission to Grants.gov.

- This solution means that the data is *not* entered into Coeus fields; these filled forms are treated more like uploaded narrative files.

# Downloading Unstitched Forms

***Where do I find the forms to upload?***

**Unstitched** forms are provided by Grants.gov. They can be retrieved at the Grants.gov web page http://www.grants.gov/web/grants/forms/r-r-family.html#sortby=1

***Forms with an asterisk (*) in the PDF column are unstitched and available for use with the upload tool.***

*Note: the comment at the top of the table – that the forms are "not submittable" – means that they are not intended to be submitted individually to Grants.gov. These have been 'unstitched' to be included in our S2S submissions as part of a full submission.*

# Downloading Unstitched Forms

1. Navigate to: http://www.grants.gov/web/grants/forms/r-r-family.html#sortby=1 and search for the form that you need for your submission.

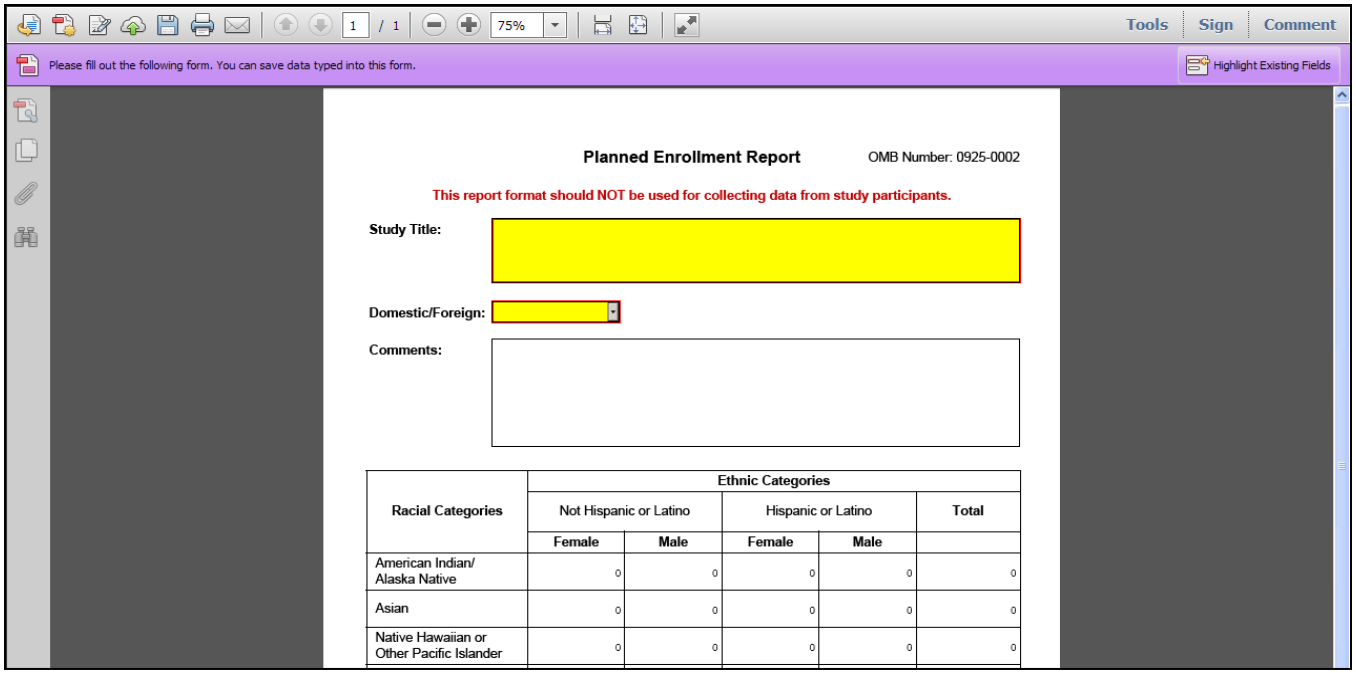
2. Download the form by clicking on the PDF* link next to the form you want to use:

* Denotes a form that is fillable for sample purpose only; and the form is NOT submittable.

| Agency Owner | ▲ Form Name | Adobe Form | Form Schema | Data Analysis | GG Version | OMB Number | OMB Expiration |
|---|---|---|---|---|---|---|---|
| HHS | PHS Cover Letter | PDF | Schema | DAT | 1.2 | 0925-0001 | 08/31/2015 |
| HHS | PHS Fellowship Supplemental Form | PDF | Schema | DAT | 2.0 | 0925-0001 | 08/31/2015 |
| HHS | Planned Enrollment Report | PDF* | Schema | DAT | 1.0 | 0925-0002 | 08/31/2015 |
| Grants.gov | Project/Performance Site Location(s) | PDF | Schema | DAT | 2.0 | 4040-0010 | 09/30/2016 |
| Grants.gov | R & R Multi-Project Subaward Budget Attachment(s) Form 10YR 30ATT | PDF | Schema | DAT | 1.0 | 4040-0001 | 06/30/2016 |

# Downloading Unstitched Forms

3. The form will open as a fillable Adobe Form which you should complete in accordance with the Sponsor's instructions and save to your computer so that you have it available to be uploaded.



# Connecting to Grants.gov

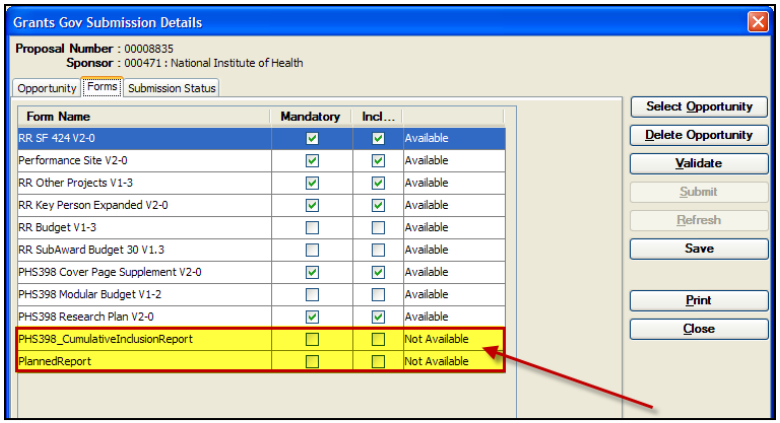
***When should I connect to the Grants.gov Opportunity?***

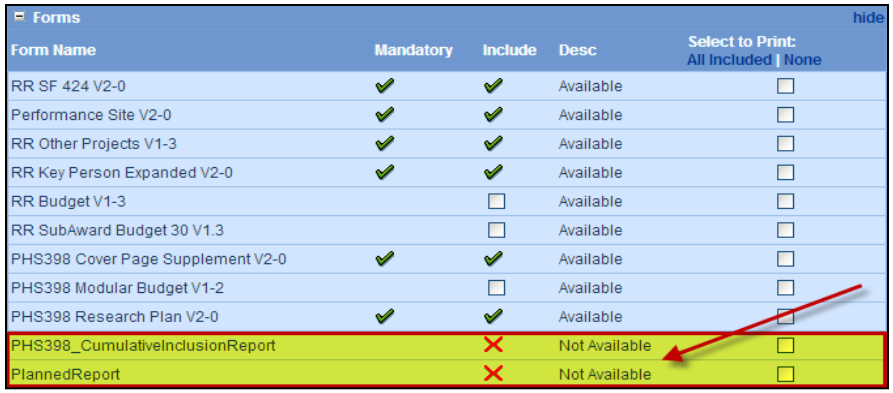
- If the all the mandatory forms are available, you can connect to the opportunity at any time.

- If the forms you will be uploading using the User Attached S2S Forms tool are **Optional**, you can connect to the opportunity either **before or after** uploading the form in the User Attached S2S Forms tool. Keep in mind the following:

# Connecting to Grants.gov

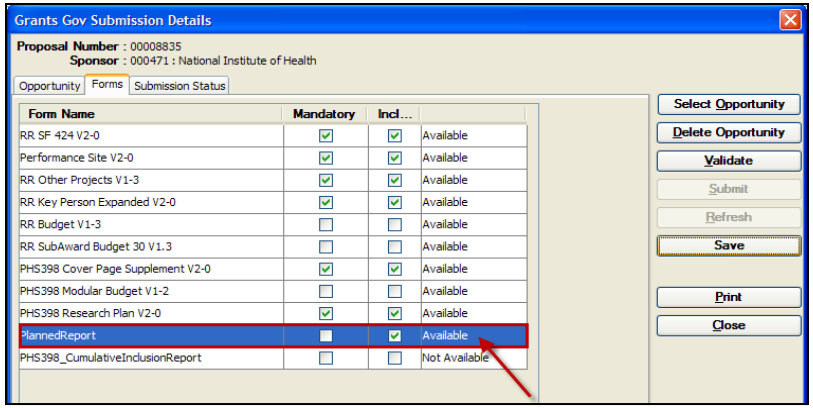
- If you connect ***before*** uploading the 'optional' forms with the tool, the Grants.gov Forms section will show those optional forms as "Not Available". The "Not Available" will automatically update to "Available" once you upload the form to the User Attached S2S Forms (you do not need to disconnect form Grants.gov for this update to take place).

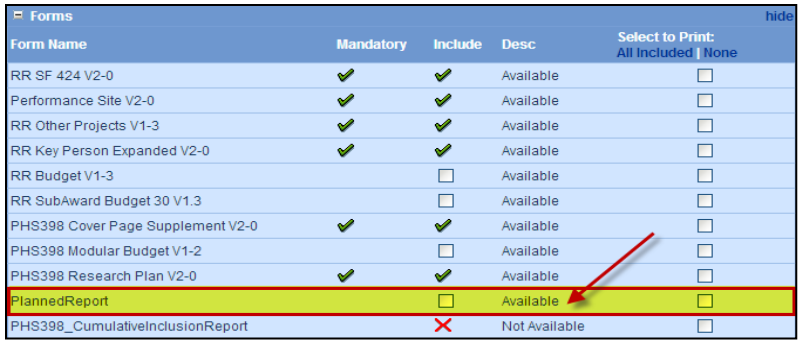


# Connecting to Grants.gov

- If you connect to the Grants.gov opportunity ***after*** uploading the forms with the tool, when you connect to the opportunity, the Grants.gov Forms will display as “Available” and allow you click the box to include them in the submission.



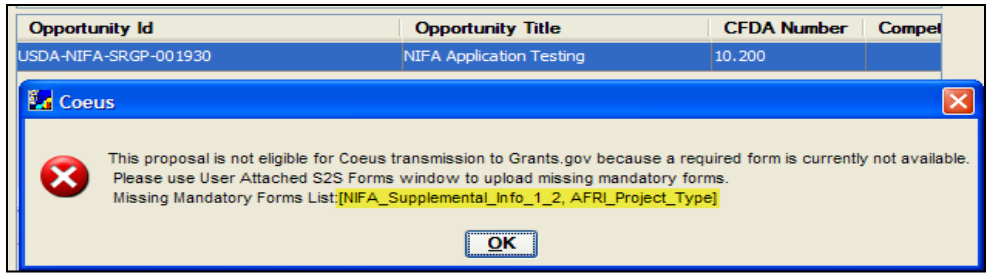



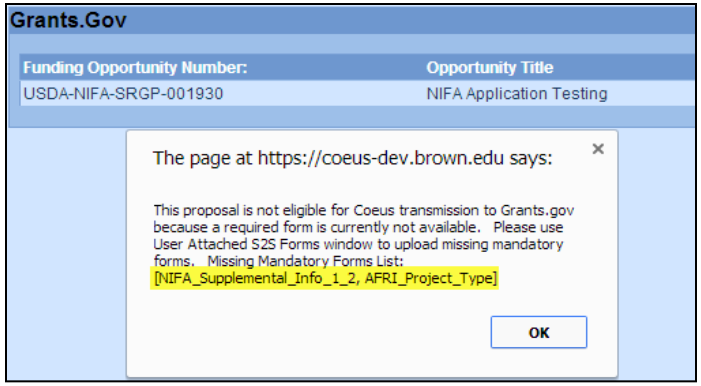

*If you connect to the Grants.gov opportunity PRIOR to uploading the forms, the optional forms will show as “Not Available” in the Grants.gov → Forms Panel. If you connect to the Grants.gov opportunity AFTER uploading these forms, the forms will show “Available” and the user can click to include them in the submission,* ***thus it is recommended to upload the S2S forms FIRST to save the number of times the user has to open the Grants.gov window.***

# Connecting to Grants.gov

***When should I connect to the Grants.gov Opportunity?***

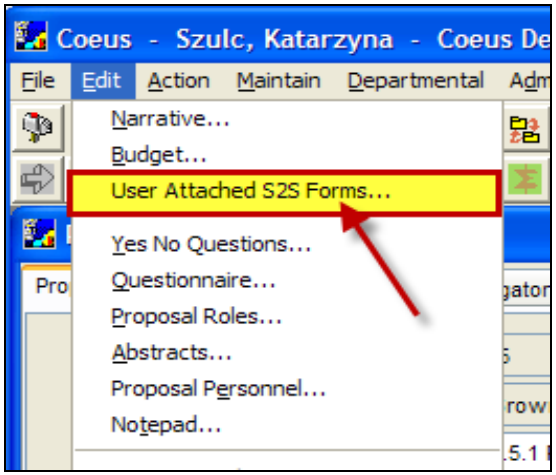
- If there are **mandatory** forms in the opportunity that are not available in Coeus, you will need to upload those unstitched forms ***first*** and then connect to the opportunity. The **Missing Mandatory Forms List** has been added to inform the user of the specific missing forms.



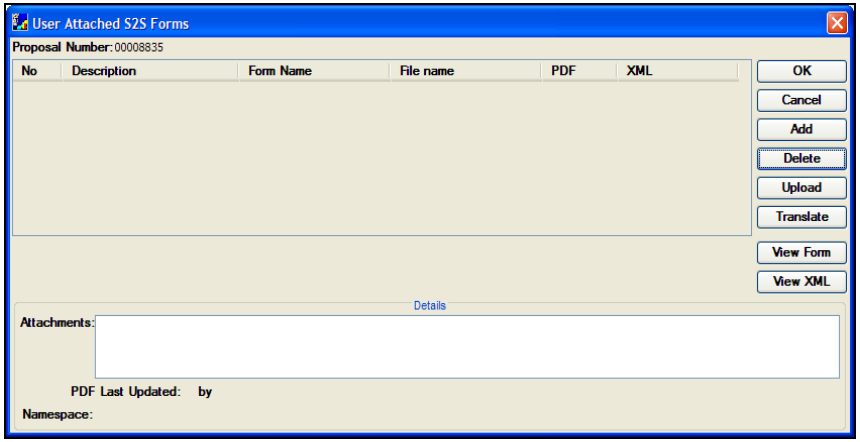
# User Attached S2S Forms Tool

| Coeus Premium | Coeus Lite |
| --- | --- |
| 1. While in a Proposal Development Record, select **Edit → User Attached S2S Forms...** from the menu bar. | 1. While in a Proposal Development Record, click on the **User Attached S2S Forms**. |



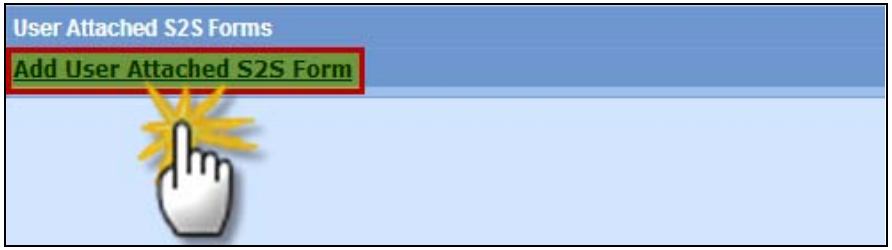
# User Attached S2S Forms Tool

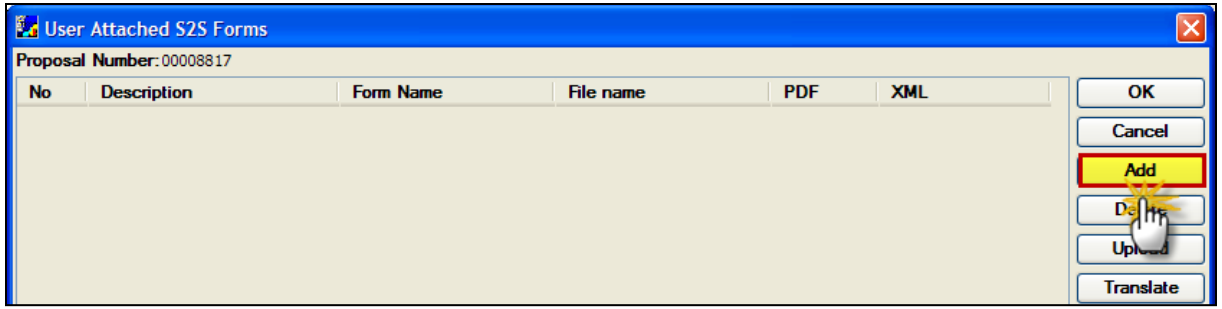
| Coeus Premium | Coeus Lite |
| --- | --- |
| The User Attached S2S Forms Window will open: | The **User Attached S2S Forms Section** will open: |



# User Attached S2S Forms Tool

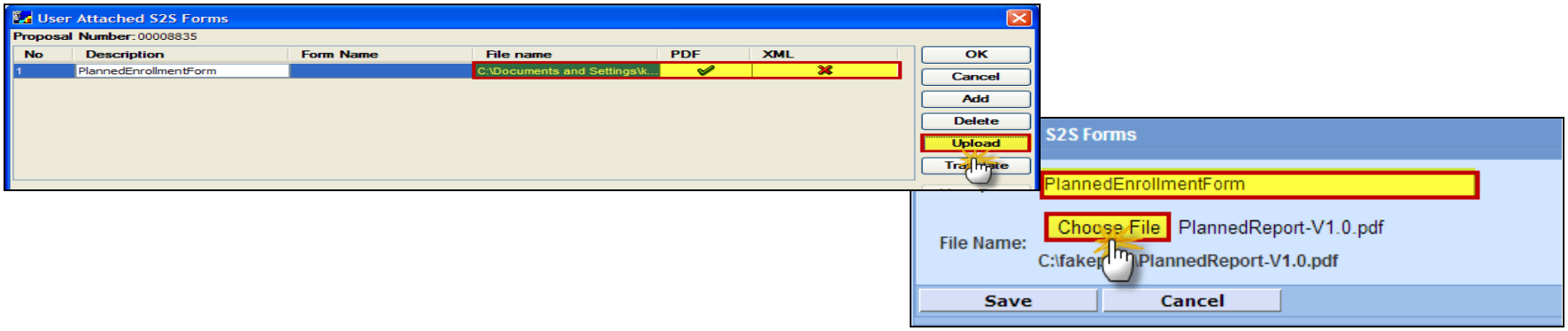
| Coeus Premium | Coeus Lite |
| --- | --- |
| 2. In the User Attached S2S Forms Window click on the [**Add**] button to generate a line. | 2. In the User Attached S2S Forms Section click on the **ADD USER ATTACHED S2S FORM LINK** button. |



# User Attached S2S Forms Tool

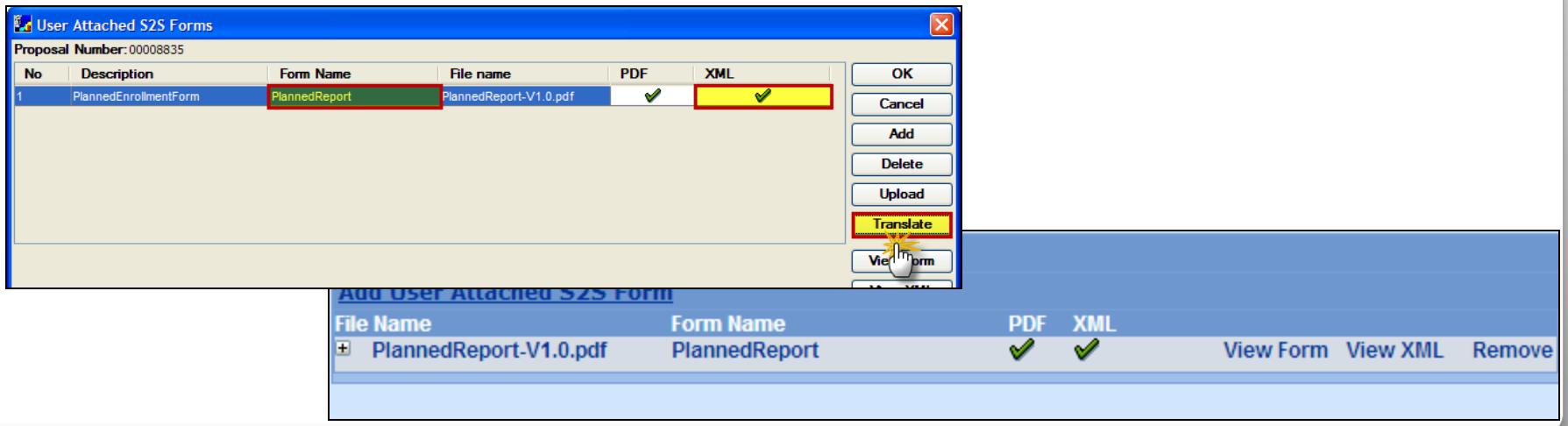
| Coeus Premium | Coeus Lite |
| --- | --- |
| 3. Click on the **Description field** to enter information about the form (e.g. enter the name of the form). Then click on the [**Upload**] button to open a search tool window and locate your unstitched form saved on your computer. | 3. Click in the **Description field** and enter some information about this upload (e.g. Enter the name of the form). Then click on the [**Choose File**] button to search for and select the form file from your computer. The **File Name field** will display the navigation path of the selected file. |



# User Attached S2S Forms Tool

| Coeus Premium | Coeus Lite |
|---|---|
| 4. Click on the [**Translate**] button. | 4. Click on the [**Save**] button to save and translate the uploaded form. |

If the target form is complete, the XML box will update with a green checkmark, and the file name will update from the location to the file name



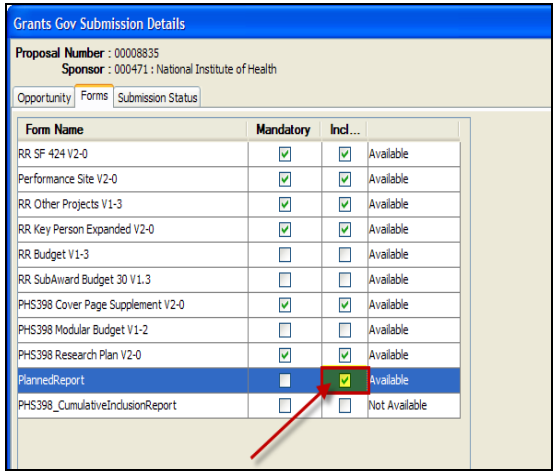
# User Attached S2S Forms Tool

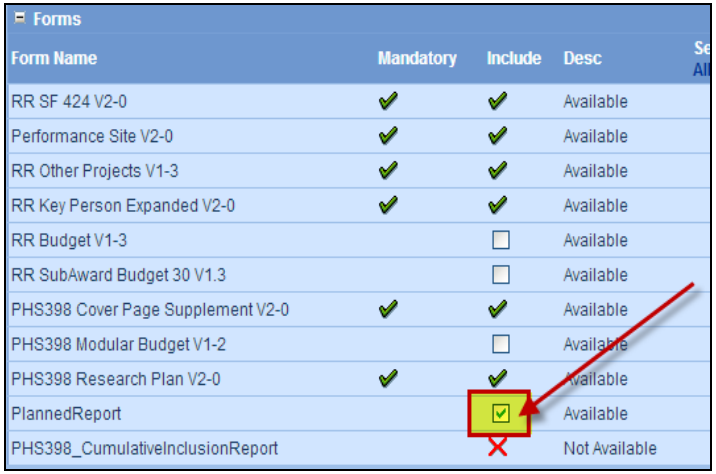
| Coeus Premium | Coeus Lite |
| --- | --- |
| 5. To add another form, click on the [**Add**] button and repeat the steps noted above.<br><br>6. To view a form, click on the row to select the form and click on the [**View Form**] button.<br><br>7. To remove an uploaded form, click on the row to select the form and click on the [**Delete**] button. | 5. To add another form, click on the **Add User Attached S2s Form link** and repeat the steps noted above.<br><br>6. To view a form, click on the row to select the form and click on the **View Form link**.<br><br>7. To remove an uploaded form, click on the row to select the form and click on the **Remove link** button |

# User Attached S2S Forms Tool

| Coeus Premium | Coeus Lite |
|---|---|

**Please remember to set the applicable form in the Grants.gov Submission Window to "Include"!!!**
**Even though you upload the form in the User Attached S2S Forms Section, it is not yet included with your submission.**
**You MUST navigate to the Grants.gov Section of the Proposal and set the appropriate form to "Include".**



# Salary Anniversary Date Inflation

# (Budgeting for PostDocs just got Easier!)

NEW

NEW

# Overview

- While most salary increases for Brown personnel occur on the start of the new fiscal year (July 1st), there are some individuals that have their salary increase based on the **Date of Hire** or **Anniversary Date** (e.g. post docs).

- In order to apply inflation based on **Anniversary Date of Hire** instead of 07/01/FY, **a new enhancement in Coeus has been introduced that allows calculating inflation for budget personnel for any of the 365 possible dates in a year**.

# Salary Anniversary Date Inflation

*The following scenario/example will walk you through the process of budgeting someone who has a salary inflated on their Anniversary Date:*

Proposal is budgeting for a TBA Post-Doc whose salary increase occurs on the **anniversary date of hire**. The Proposal Budget details are:

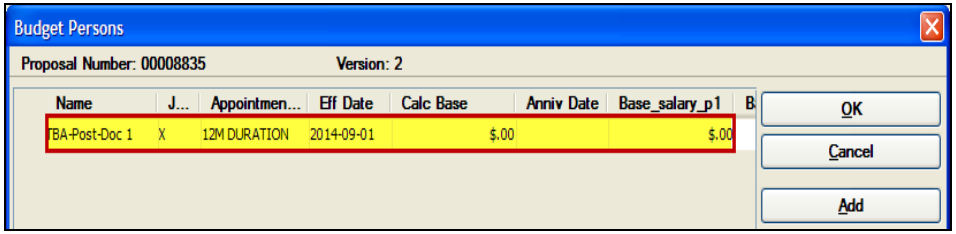
Proposal Start Date: **10/01/2014**
Proposal End Date: **09/30/2019**

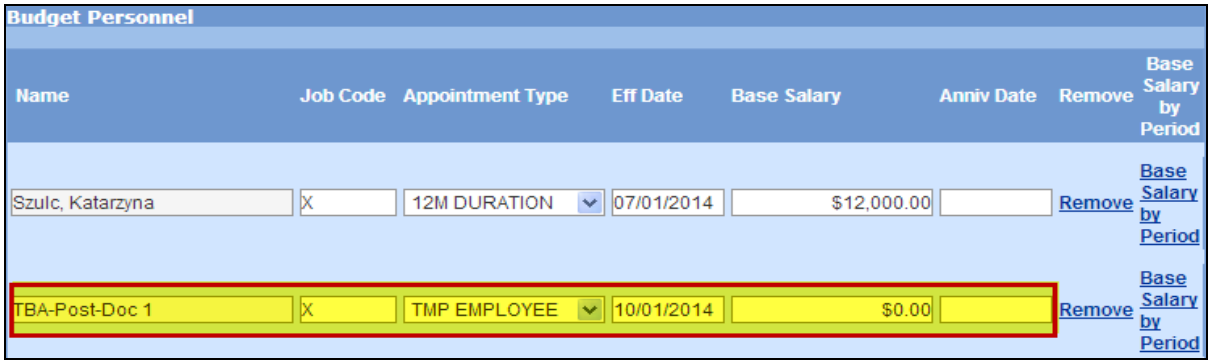
TBA Post-Doc Hire Date is **10/01/2014** (4% increase is scheduled for hire date anniversary so the next salary inflation will take place **10/01/2015 – which is the Anniversary Date that we will input into Coeus for this scenario**)

***Anniversary Date should have the same month and day as the Eff Date and then the year in which the first inflation should take place (e.g. a year from the Eff Date)**

# Salary Anniversary Date Inflation

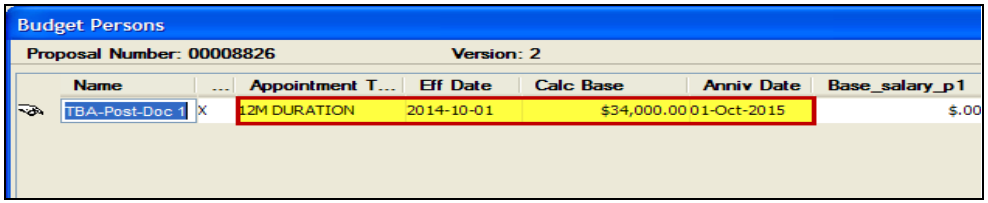
| Coeus Premium | Coeus Lite |
|---|---|
| 1. While in the Budget, add **TBA-Post-Doc 1** into the Budget Person Window. | 1. While in the Budget, add **TBA-Post-Doc 1** into the **Budget Personnel Section**. |

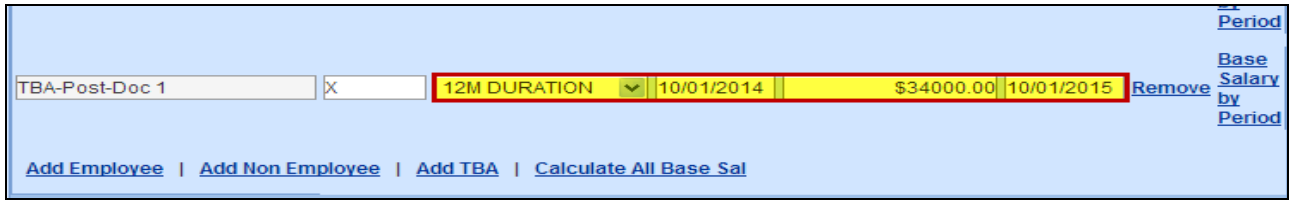


# Salary Anniversary Date Inflation

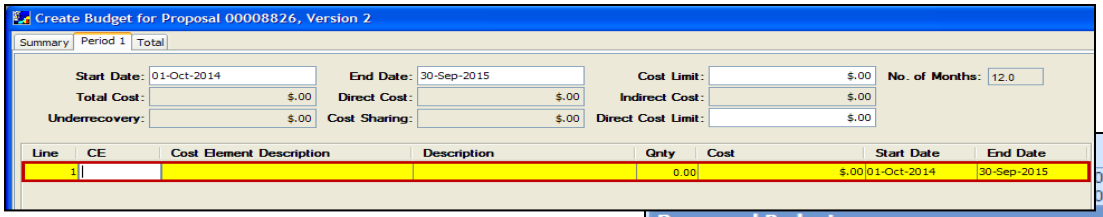
| Coeus Premium | Coeus Lite |
|---|---|
| 2. Complete the **Appointment Type**, **Eff Date**, **Cal Base, Anniv Date, and Base-salary_p (optional)** fields for that individual based on the information provided earlier in this section. | 2. Complete the **Appointment Type**, **Eff Date**, **Base salary, Anniv Date, and Base-salary_p (optional)** fields for that individual based on the information provided earlier in this section. |

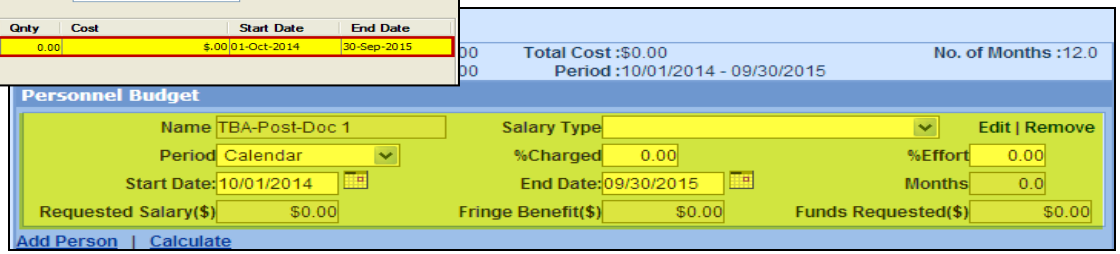


# Salary Anniversary Date Inflation

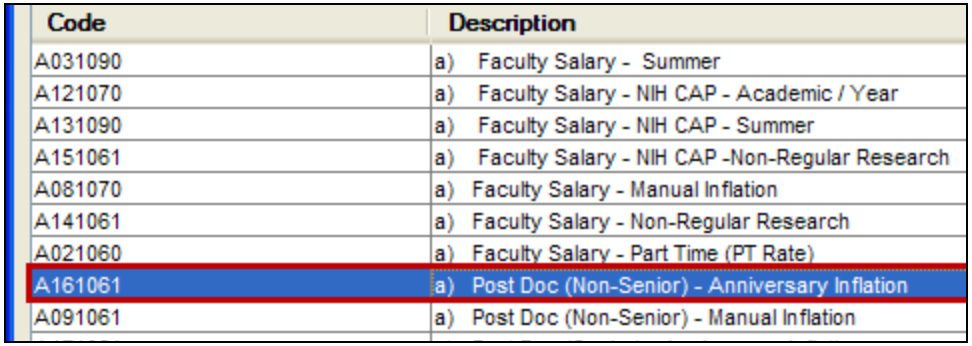
| Coeus Premium | Coeus Lite |
|---|---|
| 3. Click the [**OK**] button to close out of the Budget Persons Window and return to the Modify Budget Window and then select **Items → Add Line Item** from the menu bar. | 3. Click the [**Save**] button to save all the changes and then navigate to the **Personnel Budget** section by selecting the **PERSONNEL BUDGET** link.<br><br>Click the **ADD PERSON** link to add a personnel budget detail for the Post-Doc. |



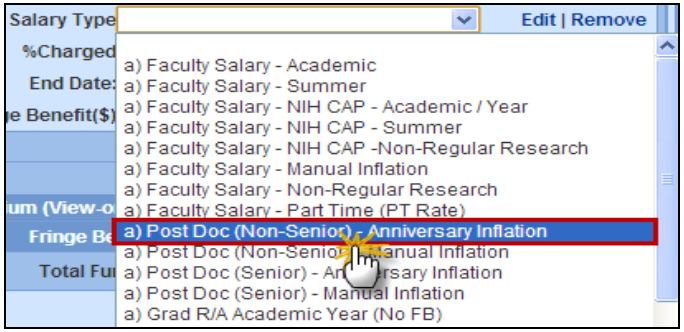



# Salary Anniversary Date Inflation

| Coeus Premium | Coeus Lite |
|---|---|
| 4. Select **Items** → **Select Cost Element** from the menu bar or double click on the **CE field** to display the list of Available Cost Elements. The Cost Elements Window will open.<br>Select the appropriate Salary Line item:<br>For our example, we will chose **A161061 – a) Post-Doc (Non-Senior) – Anniversary Inflation** and click the [**OK**] button | 4. Select the appropriate Salary Line item from the **Salary Type** drop down:<br>For our example, we will chose **a) Post-Doc (Non-Senior) – Anniversary Inflation**. |



| Code | Description |
|---|---|
| A031090 | a) Faculty Salary - Summer |
| A121070 | a) Faculty Salary - NIH CAP - Academic / Year |
| A131090 | a) Faculty Salary - NIH CAP - Summer |
| A151061 | a) Faculty Salary - NIH CAP -Non-Regular Research |
| A081070 | a) Faculty Salary - Manual Inflation |
| A141061 | a) Faculty Salary - Non-Regular Research |
| A021060 | a) Faculty Salary - Part Time (PT Rate) |
| A161061 | a) Post Doc (Non-Senior) - Anniversary Inflation |
| A091061 | a) Post Doc (Non-Senior) - Manual Inflation |



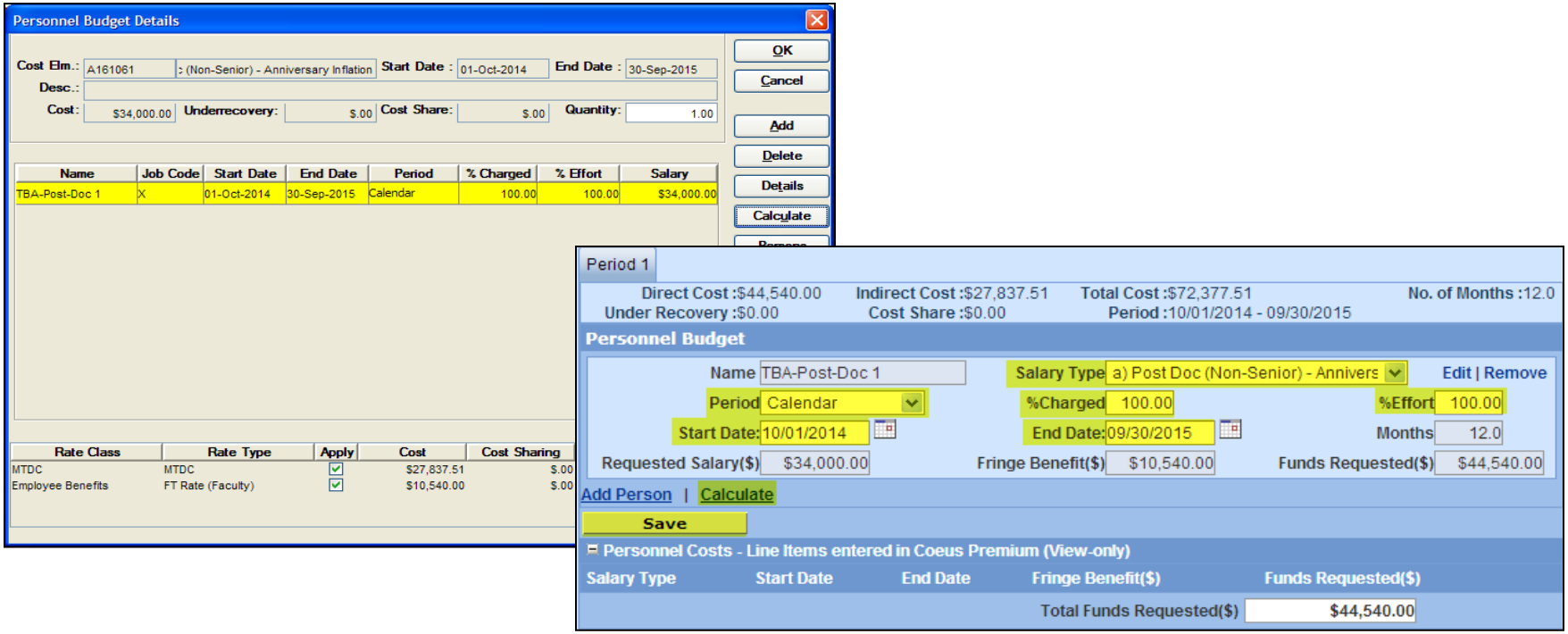
# Salary Anniversary Date Inflation

| Coeus Premium | Coeus Lite |
|---|---|
| **5. Select Items → Personnel Budget** from the menu bar to add Personnel Budget detail for the salary line item and then click on the [**ADD**] button to open the Select Budget Persons Window and select **TBA-Post-Doc 1.** | 5. N/A |

# Salary Anniversary Date Inflation

| Coeus Premium | Coeus Lite |
|---|---|

6. Check and adjust if necessary the **Start Date, End Date, and Period** fields. Also, enter the % Charged and % Effort.



# Salary Anniversary Date Inflation

| Coeus Premium | Coeus Lite |
| --- | --- |
| When the out-years of the budget are generated, Coeus will calculate the appropriate salary for this individual, for each budget period based on the Anniversary Date of the salary. | |

# Internal Biosketch Validation for R&R Senior/Key Person Profile (expanded) V2.0 Form

NEW

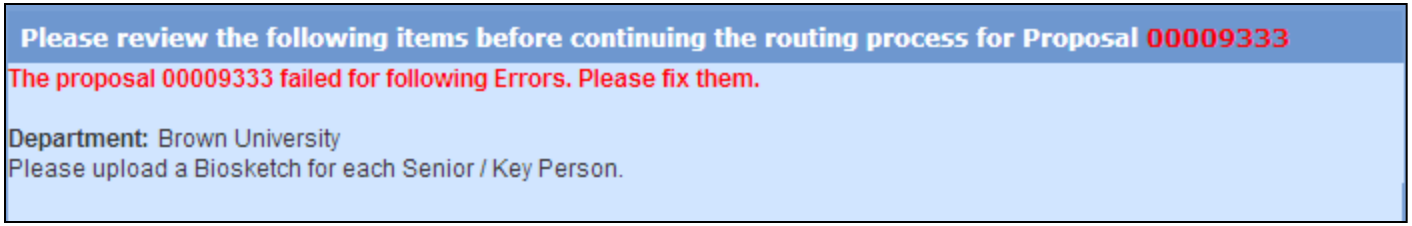
NEW

# Overview

- Since the **Biosketch** attachment on the **R&R Senior/Key Person Profile (Expanded) V2.0 Form** is not enforced by Grants.gov systems for S2S submissions, but it is required to be included, we have built an internal validation that will check to ensure that all Senior/Key People have a biosketch included.

# Biosketch Validation

- If your submission includes R&R Senior/Key Person Profile (Expanded) V2.0 Form and you do not include Biosketch attachments for ALL of the individuals that are named in the Investigator and/or Key Person Tab, you will receive the following Error message when you run validations in Coeus.



# Coeus Lite Changes

- CoeusLite – Routing History for ‘Rejected’ Proposals
- CoeusLite – PI Narrative Display

NEW

NEW

# Routing History for Rejected Proposals is Now Available in Coeus Lite

NEW

NEW

# Overview

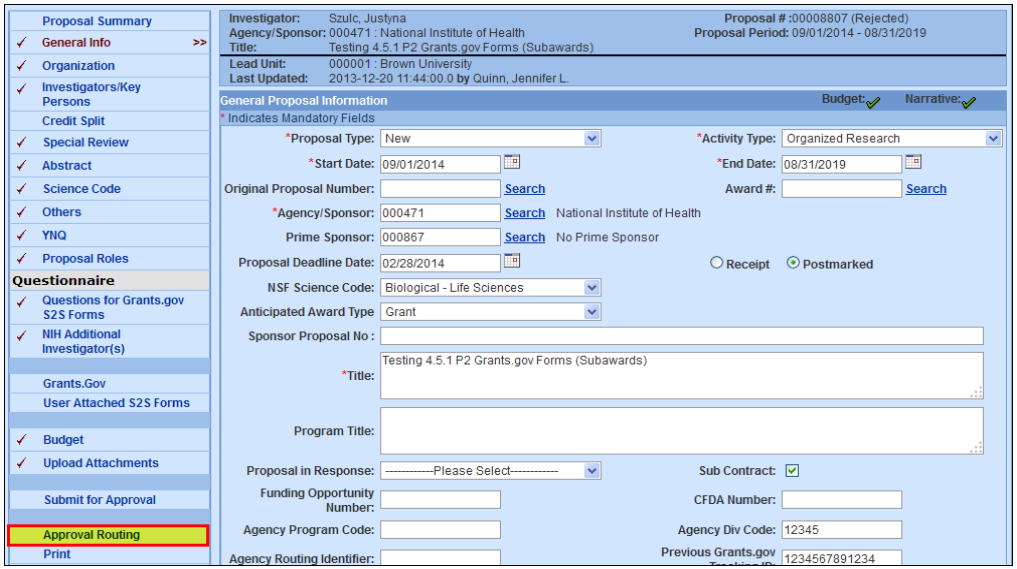
- The ability to view previous routing information including Approver's comments and attachments is now available from the **Approval Routing Screen** of Coeus Lite when the proposal is in "Rejected" status.

# Routing History for Rejected Proposals

## Coeus Lite

To view the routing details of a rejected proposal:

1. Click on the **Approval Routing Link** in the **Navigation Panel** of your proposal.

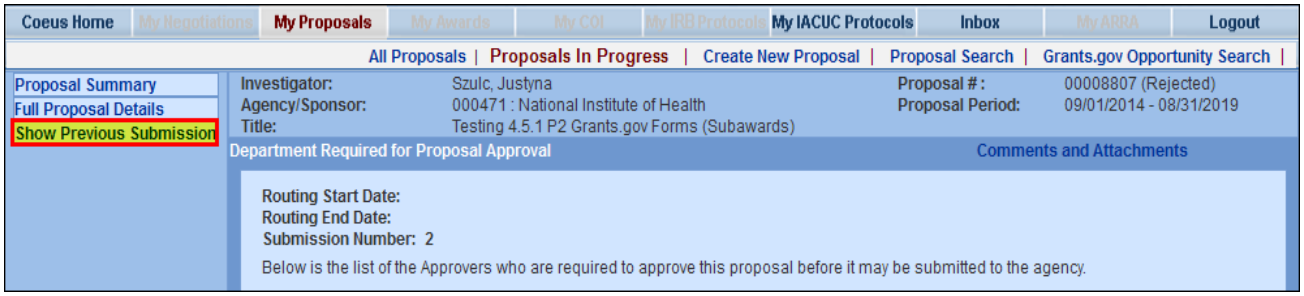


# Routing History for Rejected Proposals

## Coeus Lite

The **Approval Routing Screen** will open displaying who the Approvers are for the proposal and at what approval stop the proposal **currently** is.

2. To view the proposal's routing history click on the **Show Previous Submission Link**



# Routing History for Rejected Proposals

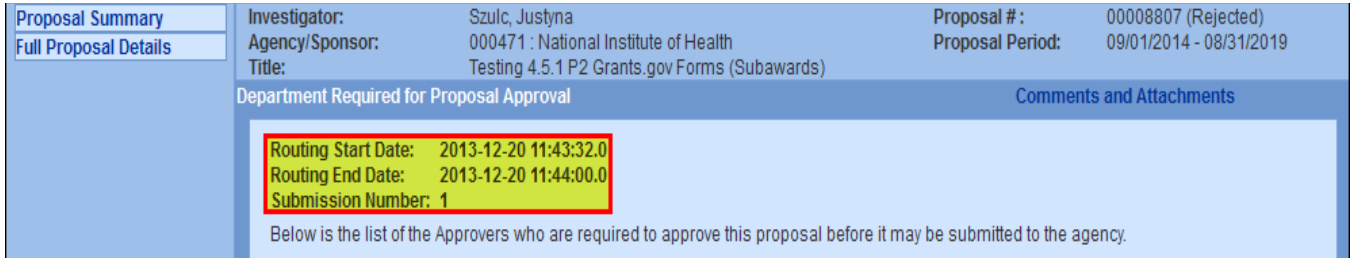
## Coeus Lite

The **Approval Routing Screen** for the previous submission will open.

It will give you the **Routing Start** and **End Dates** and the **Submission Number** of the proposal.

→**Routing Start Date** - The date the proposal was submitted for approval.

→**Routing End Date** - The date the proposal was rejected



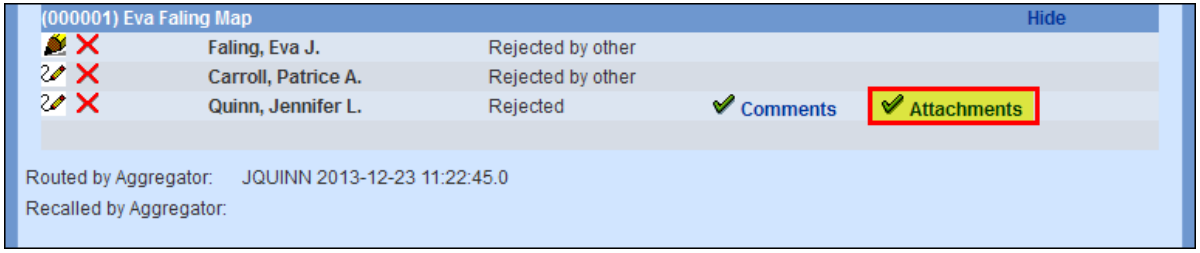
# Routing History for Rejected Proposals

## Coeus Lite

Also, from the **Approval Routing Screen** you are able to see which Approver rejected the proposal and any comments they have noted or attachments they may have uploaded.

3. If the Approver noted an explanation for why they rejected the proposal, the **Comments Link** will have a green check mark. To view their comments/explanation click on the **Comments Link.**

4. If attachments have been uploaded, the **Attachments Link** will have a green check mark. To view the attachments click on the **Attachments Link.**



# PI Narrative Display in Coeus Lite

NEW

NEW

# Overview

- With this enhancement, the individual who is named as the PI on the proposal will automatically have access to that Proposal information and will be able to view the uploaded Narrative Attachments.

*(The PI will not have access to make any modification to the Proposal unless they are assigned the appropriate role on that Proposal)*

# Rolodex –
# Unable to Tab Issue Resolved

# Overview

- Currently, when adding/updating Rolodex entries in Coeus, you will notice that you are unable to TAB from one field to the next. *(You need to use your mouse to move from one field to the next)*

- With 4.5.1 P2 you will be able to tab between fields.

# List of New/Updated Grants.gov Forms

# List of UPDATED Grants.gov Forms in FORMS-C Packages

| | |
|---|---|
| SF424 (R&R) Cover V2-0 | PHS 398 Cover Page Supplement V2-0 |
| R&R Other Project Information V1-3 | PHS 398 Career Development Award Supplemental Form V2-0 |
| R&R Senior/Key Person (Expanded) V2-0 | PHS Fellowship Supplemental Forms V2-0 |
| Project/Performance Site Location(s) V2-0 | PHS 398 Research Training Program Plan V2-0 |
| R&R Budget (5 Year & 10 Year) and Associated Subaward Budget V1-3 *[Version 1.3 Budget Forms: R&R Budget; R&R Budget 10 YR; R&R Subaward Budget Attachment(s) Form 10 YR 10 ATT; R&R Subaward Budget Attachment(s) Form 10 YR 30 ATT; R&R Subaward Budget Attachment(s) Form 5 YR 30 ATT; R&R Subaward Budget Attachment(s) Form]* | PHS 398 Training Subaward Budget Attachment(s) Form V2-0 |
| PHS 398 Research Plan V2-0 | |

# List of NEW Grants.gov Forms in FORMS-C Packages

| |
|---|
| SF424 (R&R) Multi-Project Cover V1-0 |
| Planned Enrollment Report V1-0 |
| PHS 398 Cumulative Inclusion Enrollment Report V1-0 |

# The End