

Research Administration (RA)
Guide to editing Coeus Institute Proposals (IPs)
(Version: April 23, 2019)

Contents

1. Identify Coeus Proposal Types by major characteristics.....	2
2. Edit the Proposal Development (PD) record	2
3. Coeus Notepad: attaching a description of edit made to an IP record	3
4. Change Institute Proposal (IP) record Status to: Withdrawn, Not Funded, or Void	4
5. Add Special Review Protocols to IP record.....	4
6. Link an IP to an Award when IP Status = Pending (*)	5
7. Link an IP to an Award when IP status = Not Funded (*).....	6
8. IP edits that require the Sequencing of the IP record.....	7
a. How to ‘sequence’ an IP record	7
b. Change the Principal Investigator (PI) – while <i>keeping</i> original PI.....	7
c. Change the Principal Investigator (PI) – while <i>removing</i> original PI	8
d. Change Lead Unit.....	8
e. Change Sponsor	9
f. Unlink, remove, an IP record from an Award.....	10

**Research Administration (RA)
Coeus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)**

1. Coeus Proposal Types by major characteristics

Proposal Types	IP included in Enterprise Reporting?	IP sent to SPSS?	IP used to create SAP Awards?
Competing Types			
New	Y	Y	Y
Renewal	Y	Y	Y
Resubmission	Y	Y	Y
Task Order	Y	Y	Y
Supplement	Y	Y	Y
Non-competing Types			
Administrative Action	N	N	N
Continuation	N	N	N
Internal Application	N	N	N
Master Agreement	N	N	N
Negotiation Only	N	N	N
Pre-application	N	N	N
Revision	N	N	N

2. Proposal Development (PD) record is not edited

As a rule, PD's are not edited after final approval by RA.


Once approved by RA, Coeus creates a corresponding unique Institute Proposal (IP) record. The PD record is then 'archived' and preserves exactly what the Principal Investigator submitted. Edits required post-submission should be made by the RA in the PD's IP record. However, RAs may email ORIS if they believe a PD edit is necessary.

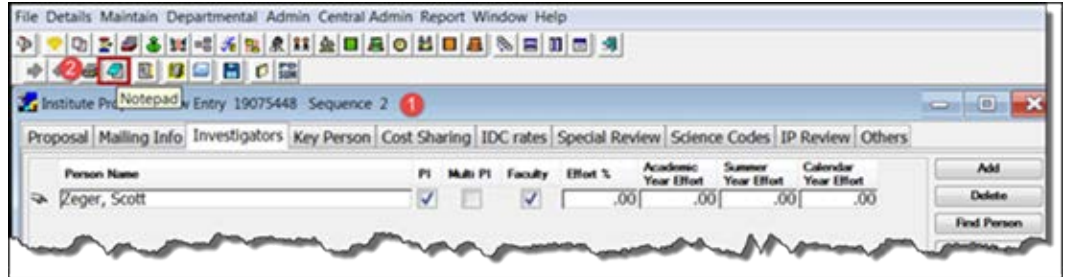
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3. Coelus Notepad: attaching a description (comment) of edit made to an IP record


Following certain edits to the IP record RAs should consider adding a brief description of the changes in *that* IP record's Notepad. It is easy to inform others of actions taken.

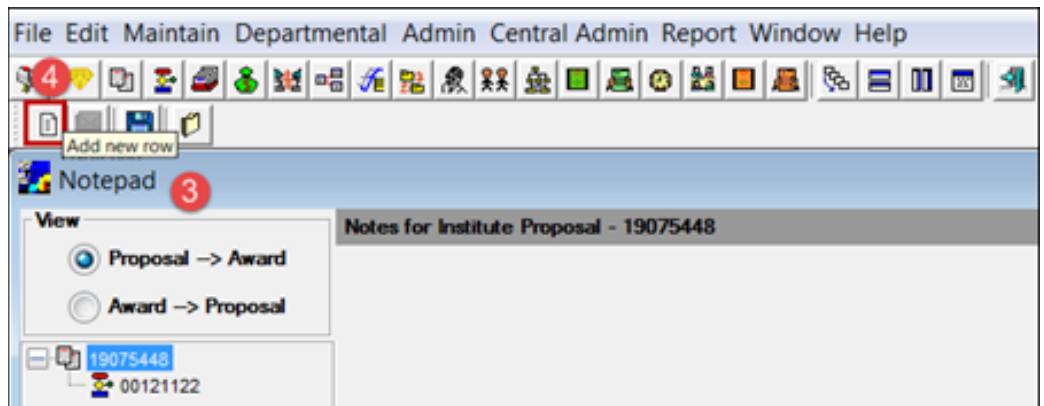
1. From within the open IP record

2. Select Notepad, , Icon

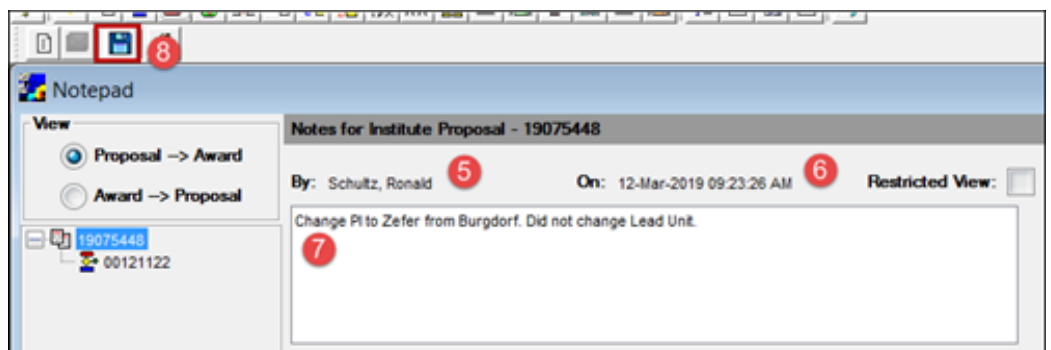


3. From within Notepad

4. Select 'Add new row', , Icon



5. Your name
6. Time stamp
7. Enter description of edit made
8. Save Note



9. Close Notepad

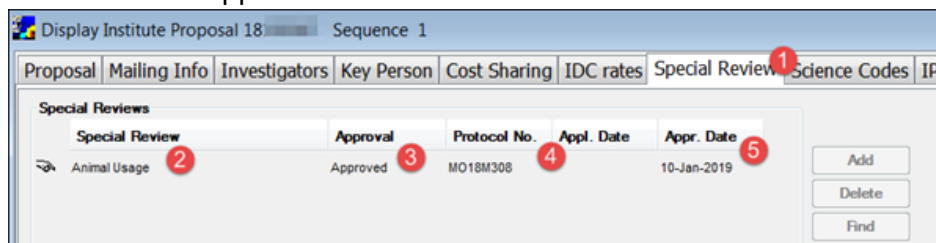
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Coeus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)**

4. Change Institute Proposal (IP) record Status to: Withdrawn, Not Funded, or Void

- a. IP Proposal Type: Any
- b. IP Status: Pending
- c. Do this:
 1. Open IP in Edit
 2. Change Status
 3. Make a note in Notepad describing the changes you made
 4. Save IP record

5. Add Special Review Protocols to IP record

1. Select Special Review Tab
2. Select the Special Review topic
3. Select Approved
4. Enter Protocol number
5. Enter Protocol Approval Date




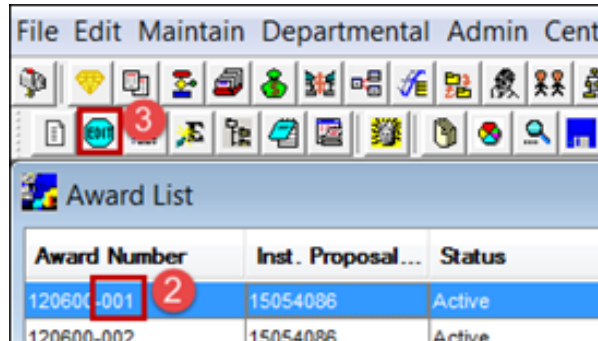
6. No note is required
7. Save IP record

**Research Administration (RA)
Coelus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)**

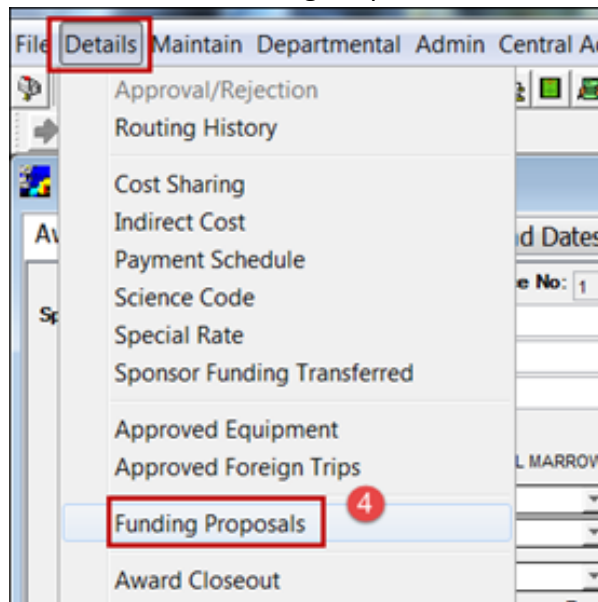
6. Link an IP to an Award when IP Status = Pending (*)

- a. IP Proposal Type: Supplement
- b. IP Status: Pending
- c. Do this:

- 1. Open Award Module,  Icon
- 2. Search for the six-digit SAP award number – followed by '-001'
- 3. Open Award record in Edit



- 4. Select Details > Funding Proposal



- 5. Select Add Button
- 6. Enter IP number and select Find
- 7. Highlight the IP record
- 8. Select Ok Button
- 9. Save record

(*) To unlink, remove, an IP from an Award see topic 8-f, below.

Research Administration (RA)
Coeus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)

7. Link an IP to an Award when IP status = Not Funded (*)

- a. IP Proposal Type: Supplement
- b. IP Status: Not Funded
- c. Do this:
 - i. First, change IP Status to Pending:
 1. Open IP in Edit
 2. Change Status to Pending
 3. Make a comment in Notepad describing the changes you made
 4. Save IP record
 - ii. Then, link IP to Award by:
 1. Open Award Module
 2. Open Award record in Edit
 3. Select Details > Funding Proposal
 4. Select Add Button
 5. Enter IP number and select Find
 6. Highlight the IP record
 7. Select Ok Button
 8. Save record


(*) To unlink, remove, an IP from an Award see topic 8-f, below.

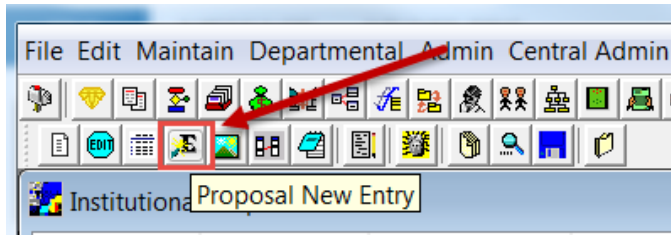
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8. IP edits that require the Sequencing of the IP record

a. How to 'sequence' an IP record

1. IP Proposal Type: Any
2. IP Status: Any
3. Do this:
 - a. To preserve the original (current) IP record, e.g. 'Sequence 1', start the

edit process by selecting the Icon "Proposal New Entry", Icon :



And, continue making necessary edits as described below.

b. Change the Principal Investigator (PI) – while *keeping* original PI

1. Confirm new Sequence number
2. Select Investigator Tab
3. See Original PI
4. See Lead Unit

Person Name	PI	Multi PI	Faculty	Effort %	Academic Year Effort	Summer Year Effort	Calendar Year Effort
Burgdorf, Julia	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00	.00	.00	.00

Lead	Number	Name	Osp Administrator
<input checked="" type="checkbox"/>	[16040100]	ACADEMIC SPONSORED	Hopkins, Jennifer
<input type="checkbox"/>	[17046525]	INFECTIOUS DISEASES	Alston-Rodgers, Katrina M

5. Select Find Person and search for new PI (example: Scott Zeger)
6. Place checkmark in "PI" box next to new PI name
7. Select Find Unit and search for Lead Unit of proposal (#4 above)
8. Place checkmark in "Lead" unit number box of this IP record

Person Name	PI	Multi PI	Faculty	Effort %	Academic Year Effort	Summer Year Effort	Calendar Year Effort
Burgdorf, Julia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00	.00	.00	.00
Zeger, Scott	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	.00	.00

Lead	Number	Name	Osp Administrator
<input type="checkbox"/>	[16015000]	BIostatistics	Sparks, Denise
<input checked="" type="checkbox"/>	[16040100]	ACADEMIC SPONSORED	Hopkins, Jennifer

9. Make a comment in Notepad describing the changes you made
10. Save IP record

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c. Change the Principal Investigator (PI) – while *removing* original PI

1. Confirm new Sequence number
2. Select Investigator Tab
3. Point to PI
4. Select Delete

5. Find Person...new PI (example: Scott Zeger)
6. Place checkmark in “PI” Box
7. Select Find Unit and search for Lead Unit of proposal
8. Place checkmark in “Lead” unit number box of this IP record

9. Make a note in Notepad describing the changes you made
10. Save IP record

d. Change Lead Unit

1. Confirm new Sequence Number
2. Select Investigator Tab
3. Find Unit Lead Unit number
4. Place checkmark in “Lead” unit number box of this IP record

5. Make a comment in Notepad describing the changes you made
6. Save IP record

**Research Administration (RA)
Coeus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)**

e. Change Sponsor

1. Confirm new Sequence Number
2. Select Proposal Tab
3. Find Sponsor

The screenshot shows the 'Institute Proposal New Entry' form for proposal 18120112. The 'Sequence 2' tab is selected and highlighted with a red circle 1. The 'Proposal' tab is also highlighted with a red circle 2. The 'Sponsor' field is highlighted with a red circle 3. The form contains the following information:

Proposal No:	18120112	Seq No:	2	Award Number:	129856-001	Status:	Funded	
Merged With:	...							
Title:	Optimization and Application of Next Generation Steels in Construction							
Proposal Type:	New	Sponsor Prpal No:						
Account:			Activity Type:	Organized Research				
NSF Code:	A.04 : Civil - Engineering		Notice Of Opportunity:	Federal Solicitation				
Anticipated Award Type:	Grant							
Sponsor:	300883	NATIONAL SCIENCE FOUNDATION						
Prime Sponsor:								

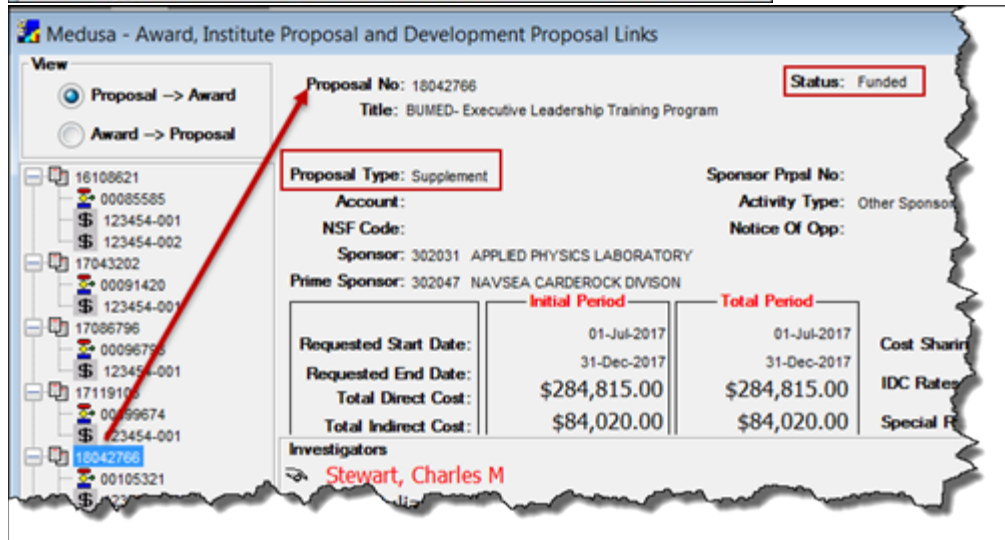
4. Make a comment in Notepad stating change you made
5. Save IP record

Research Administration (RA) Coelus Institute Proposal (IP) Guide Meeting #5 (April 23, 2019)

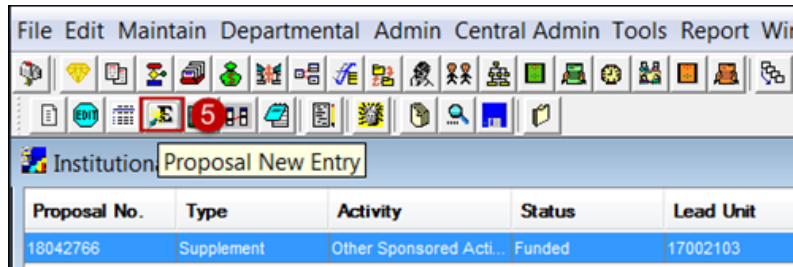
f. Unlink, remove, an IP record from an Award

i. Open IP Module

1. Search for IP number
2. Highlight the IP record
3. Select Medusa to confirm the IP record is linked to the award

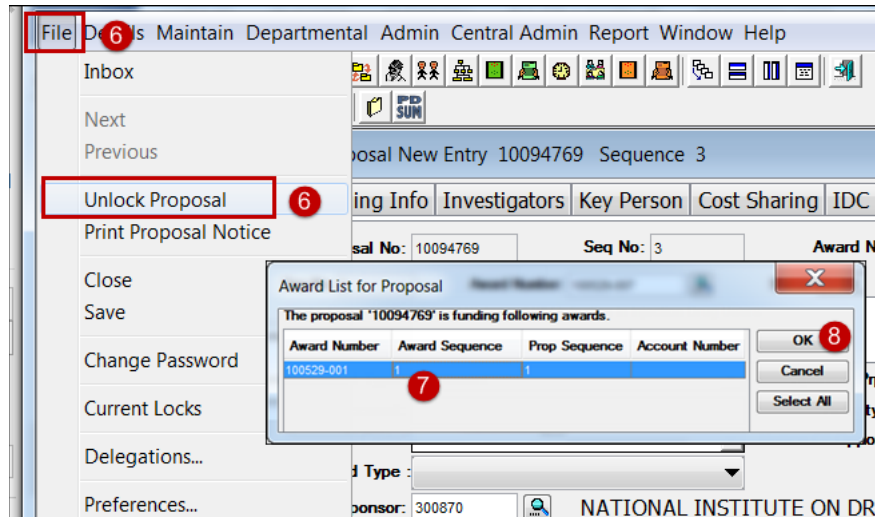


4. Close Medusa
5. Open IP record in 'New Entry' edit

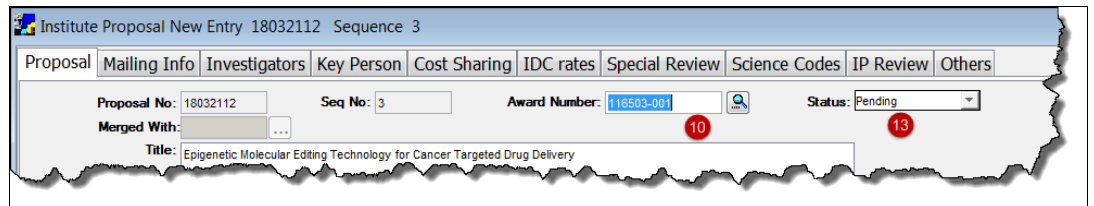


**Research Administration (RA)
Coelus Institute Proposal (IP) Guide
Meeting #5 (April 23, 2019)**

6. Select File > Unlock Proposal
7. Highlight the Award number
8. Select Ok button



9. Go to IP Proposal Tab
10. Highlight Award Number field
11. Select Delete
12. Save
13. Confirm that Status has changes to PENDING (*)



(*) Email coelus-help@jhu.edu if Status does not change.

14. Enter Comment in Notepad
15. Open Medusa – confirm IP no longer linked to award