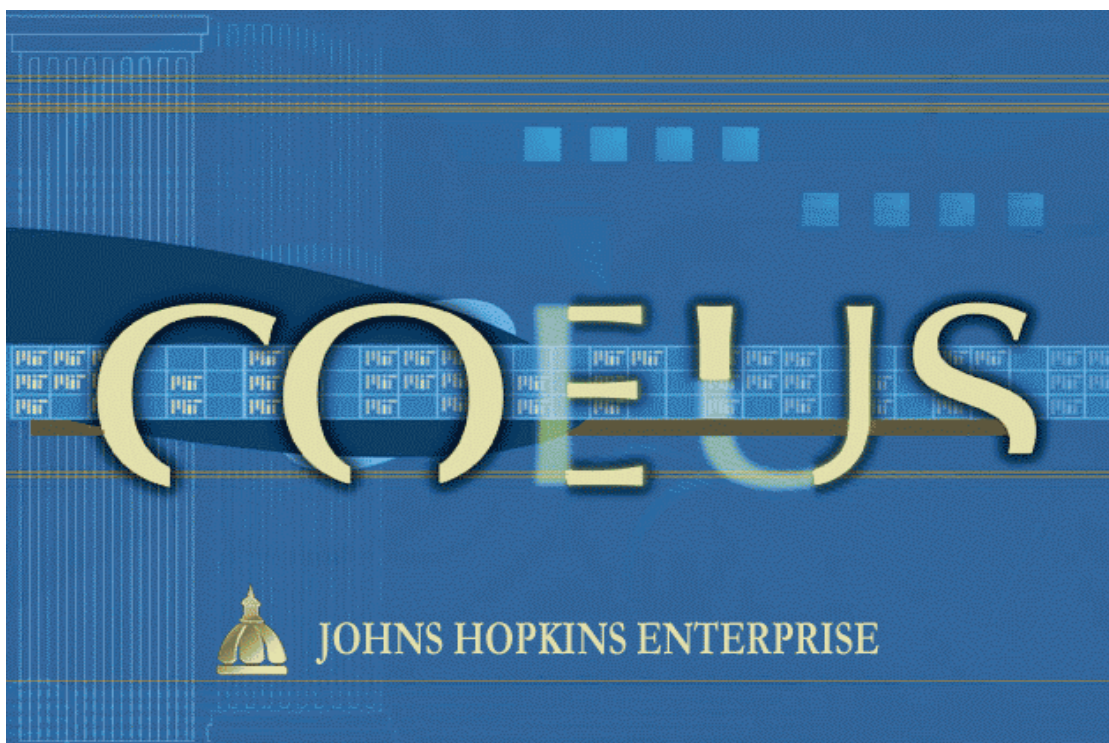


Coeus User Maintenance: A Guide to Coeus Roles and Rights



Document Date: 2013

**NOTE: Since the upgrade to 4.4.2, user maintenance
Is performed by ORIS staff.
Please note the information required for ORIS to
perform user maintenance.**

*

Access instructions for Coeus Lite and Premium can be found at the ORIS website
at: <http://jhuresearch.jhu.edu/oris.htm>

Table of Contents

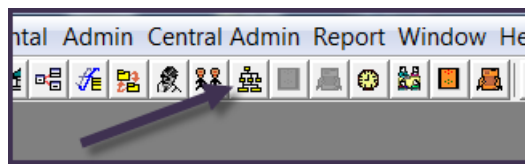
REQUESTING USER MAINTENANCE FROM ORIS	3
Proposal Development Roles.....	4
Red Roles:	4
Blue Roles:.....	4
Aggregator.....	4
Budget Creator	5
Narrative Writer	5
Viewer.....	6
Yellow Roles.....	6
Modify All Dev Proposals.....	6
Proposal Creator	7
Rolodex Maintainer	7
View All Dev Proposals	7
View Award	7
View Award Documents	7
View Institute Proposal	7
View Negotiations.....	7
View Subcontract.....	7
View>Assigned Roles for a Person	8
View All Users Assigned to a Role.....	8
Transferring User Accounts	9
Terminated Employees.....	9
Conclusion.....	9

REQUESTING USER MAINTENANCE FROM ORIS

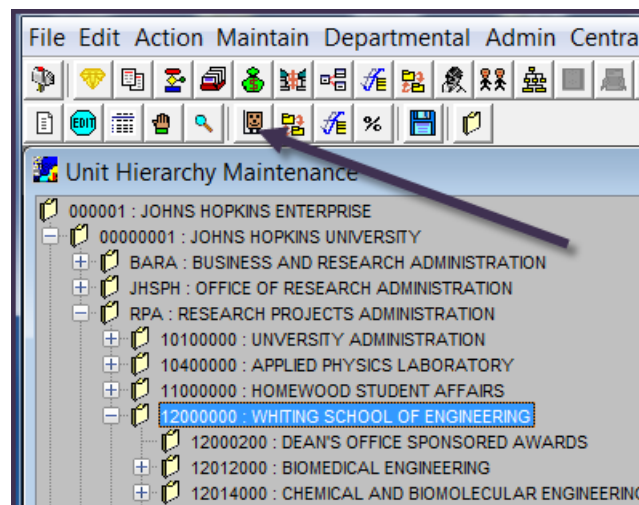
Roles, and the rights they contain, relate to the ability to create or edit parts of a proposal development record, as well as initiate approval routing or submit proposals to sponsors.

Although User Maintenance was historically handled within each department, since the upgrade to 4.4.2, this function rests with ORIS staff. Any user requiring Coeus roles may contact ORIS staff at coeus-help@jhu.edu to request roles.

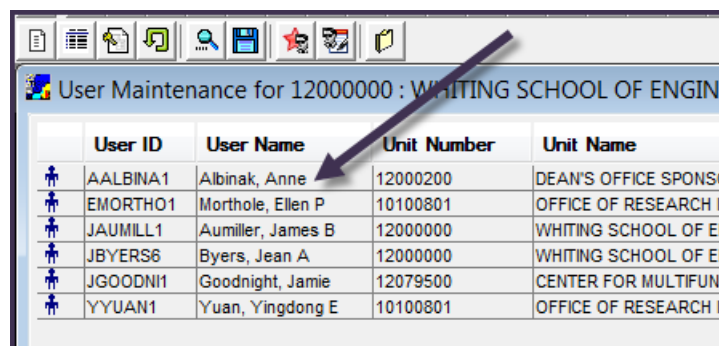
It is recommended that administrative staff periodically review their department's users and roles on the unit hierarchy to ascertain whether appropriate roles have been assigned. To see the unit hierarchy, from within Coeus, click on the icon below:



To view users for a highlighted unit, click on the icon below:



To view a user's roles within that unit, double click on the person's name:



To request ORIS assign or change a user's roles, the following information must be provided:

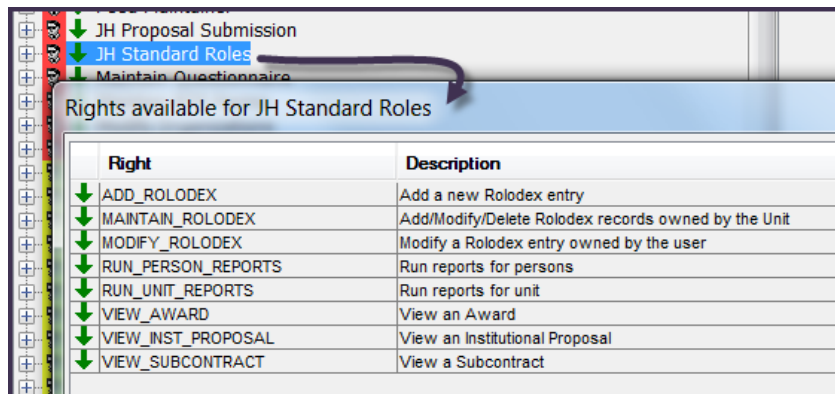
- User Name
- Cost Center(s) in which roles should be assigned
- Roles to be granted

An e-mail will be sent to the user once the roles have been established.

Proposal Development Roles

Red Roles:

These roles are granted at the Enterprise level of the unit hierarchy. Currently, the JH Standard Roles role is added to most new users of Coeus. Rights contained in that role are shown below:



Right	Description
ADD_ROLODEX	Add a new Rolodex entry
MAINTAIN_ROLODEX	Add/Modify/Delete Rolodex records owned by the Unit
MODIFY_ROLODEX	Modify a Rolodex entry owned by the user
RUN_PERSON_REPORTS	Run reports for persons
RUN_UNIT_REPORTS	Run reports for unit
VIEW_AWARD	View an Award
VIEW_INST_PROPOSAL	View an Institutional Proposal
VIEW_SUBCONTRACT	View a Subcontract

Blue Roles:

When blue roles are given on the Unit Hierarchy, for EVERY proposal development record created within that unit, the users with these roles will default in to the Proposal Roles module of the proposal development record.



Aggregator

- Rights associated with role:
 - Certify the investigators
 - Delete a Proposal (only "In Progress" proposals may be deleted)
 - Create a Proposal Hierarchy
 - Answer Yes/No questions
 - Answer Research Compliance Questionnaire

- Submit the proposal for departmental routing and Institute approval
 - Maintain proposal roles
 - Modify budget
 - Modify narrative
 - Modify proposal details
- Aggregators have full access rights to a proposal in progress. The creator of a proposal is automatically assigned a role of Aggregator. There can be multiple users with the Aggregator role on a proposal.
- Aggregators can create and modify the proposal details, create proposal narratives, attach narrative files to the proposal, and create and modify proposal budgets.
- Aggregators control which users have access to their proposals in progress, and can apply and remove users as needed to roles such as Aggregator, Budget Creator, Viewer, or Narrative Writer.
- All Aggregators are notified if the proposal is rejected and when the proposal is submitted to the sponsor.
- **Only the Aggregator can certify investigators, therefore, if departments wish for PIs to certify themselves, they must be granted the Aggregator role for the proposal.**
- **Only an Aggregator can submit the proposal for Approval Routing.**

Budget Creator

- Rights associated with role:
 - Modify budget
 - View and Modify proposal details
 - View narrative
- Budget Creators can create and modify a proposal budget and modify proposal details.
- Budget Creators also have the ability to view the proposal narrative module and attachments, but cannot create or modify narrative files for the proposal.

Narrative Writer

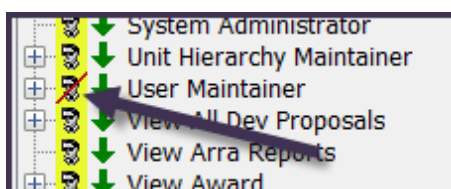
- Rights associated with role:
 - Modify narrative
 - View and Modify proposal details
 - View Budget
- Narrative Writers can create proposal narratives and upload narrative files to the proposal and also modify proposal details.
- Narrative Writers can view the budget, but cannot modify the budget details.

Viewer

- Rights associated with role:
 - View budget
 - View narrative
 - View proposal details
- A Viewer can view the proposal, including the proposal details, the narratives, and the budget module.
- The Viewer cannot create or modify any portion of the proposal.

Yellow Roles

Yellow roles are required at the individual department level. The roles and rights at this level only have effect in the department to which the person is associated. Also review the function of the descend flag – it directly affects the scope of the department level roles.



Note that a **red slash** through the person icon means that the role has been inactivated by Johns Hopkins. These roles are not displayed in the user details window (below) and are not available to assign.

Modify All Dev Proposals

- Rights associated with role:
 - Answer Yes/No questions
 - Delete Any Proposal
 - Maintain proposal abstracts
 - Maintain proposal roles
 - Modify budget
 - Modify narrative
 - Modify proposal details
- Users with Modify All Dev Proposals can modify all parts of a proposal development record.
- Users with this role CANNOT certify investigators, maintain degree info for proposal personnel, maintain person details for proposal personnel, or submit the proposal for approval. **However, they are able to grant themselves the Aggregator role in order to perform these functions.**
- When this role is granted in conjunction with the Proposal Creator role, the user can copy proposal development records (for the unit) created by someone else.

Proposal Creator

- Rights associated with role:
 - Create a new proposal.
- By default, a **Proposal Creator is an Aggregator** of the proposal development record. This role CANNOT be descended to lower units. This role must be explicitly granted at each Unit for which the user can create proposals.

Rolodex Maintainer

- Rights associated with role:
 - Add a new rolodex entry
 - Modify a rolodex entry owned by User
 - Delete a rolodex entry owned by User
- The rolodex is used to store contact information for individuals and vendors outside of Johns Hopkins. These may be collaborating investigators at other institutions as well as contacts at sponsors.

View All Dev Proposals

- View All Dev Proposals can view all parts of all proposal development records for the Unit.

View Award

- View award can view all parts of the award record, except Attachments and Subcontracts.

View Award Documents

- View Award documents, when combined with View Award, can view the award record, including Attachments.

View Institute Proposal

- View Institute Proposal can view the Institute Proposal record. The Viewer cannot create or modify any portion of the Institute Proposal record.

View Negotiations

- View Negotiations can view negotiation activity recorded for an Institute Proposal record. The viewer cannot create or modify any portion of the Negotiation Activity.

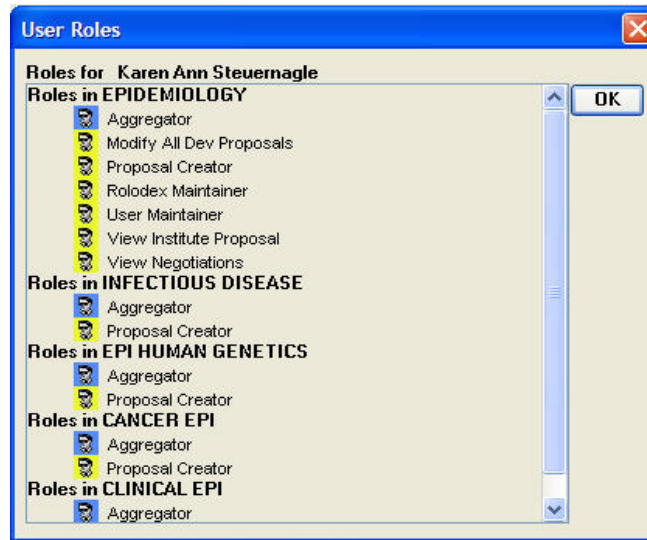
View Subcontract

- View Subcontract, when combined with View Award, can view all parts of the subcontract record associated with an award record.

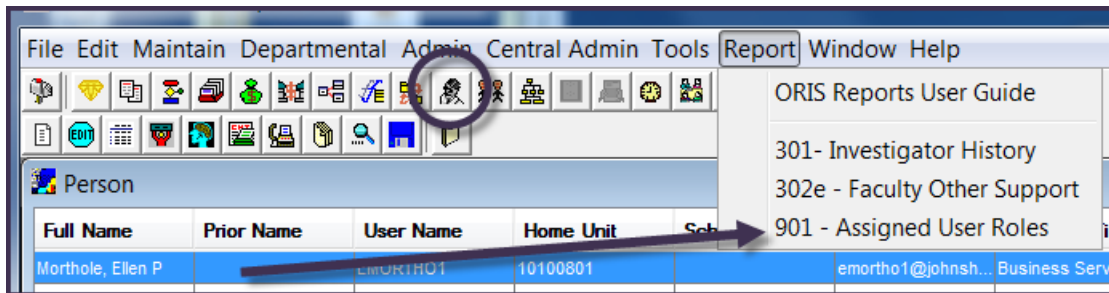
View>Assigned Roles for a Person

- See all roles that have been assigned to a specific user by selecting the user on the User Maintenance Screen, and then selecting View>Assigned Roles from the menu.

A new window displays all units, and roles assigned within those units, for that user.

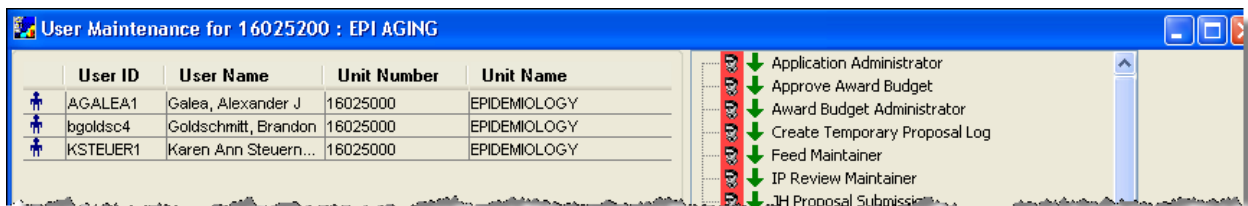


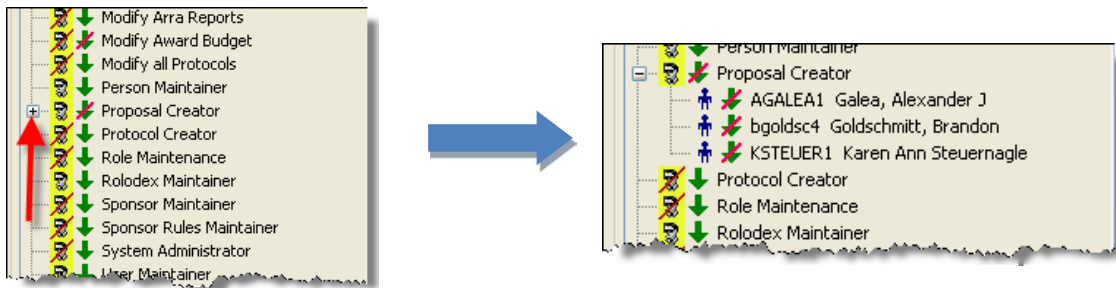
- Additionally, an ORIS report is available which also will show all units and roles assigned in those units for the person highlighted in the Person search.



View All Users Assigned to a Role

- Users assigned to a specific role can be viewed by clicking the + button next to the role name displayed on the right of the User Maintenance window.





Transferring User Accounts

When a staff member transfers to another Department, Lab, or Center (DLC) within the Institution, their assigned roles should be removed, and then their Coeus User Account should be MOVED to their new DLC. Please include the name of both the former and the new DLC in your request to Coeus-help.

Terminated Employees

When a staff member terminates, all of their assigned roles are to be removed, and their Coeus User account marked as “Inactive.” Please be sure to make the distinction between a *moved* employee and a *terminated* employee in your request to Coeus-help.

★ | **User Accounts are never deleted from the database.**

Conclusion

- Every person who uses Coeus must have a user account.
- Every user has a set of roles which allow them to perform functions within the Coeus application.
- Every role is composed of rights which define a specific functionality.
- Users and Roles are configured through the Coeus Premium interface.
- Users and their roles are associated to one or more units within a department, lab, or center’s unit hierarchy.
- If a user has different responsibilities in various units, they can be set up with the appropriate roles for each of the units.

- If you need help with Coeus at any time, please email:
 - coeus-help@jhu.edu
- Visit the Coeus Help and Tutorials Website at:
 - http://prcoeus.johnshopkins.edu/orisite/oris_web/oris_index.html