



CoeusWeb Quick Guide as of January 2023

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Transitioning away from Coeus Premium

Why the transition?

The VUMC Office of Sponsored Programs (OSP) manages the Coeus system for grant proposals and awards management. Coeus Premium has been a reliable work-horse for VUMC, but it is experiencing serious limitations. First, the foundational software is almost twenty years old. Java WebStart - the tool for downloading and installing Coeus Premium—has been deprecated by Oracle and is no-longer supported. VUMC IT is also moving away from desktop software in favor of web and cloud applications that are easier to upgrade and more secure. Finally, Coeus connects to a dozen other VUMC systems (including WorkDay), and those integrations are *much* more difficult with Coeus Premium.

In addition to the technical challenges, Coeus Premium is not intuitive or user-friendly. It takes a long time and a lot of practice to get comfortable using the system. The CoeusHelp team has noticed an increasing proportion of help questions and errors coming from users struggling with Premium. Finally, the Premium application is very difficult to change. The CoeusHelp team can more quickly address bugs in and implement improvements to CoeusWeb. Users are already familiar with a growing list of features and benefits available only in CoeusWeb. Going forward, all proposal development will occur in CoeusWeb.

Institute Proposals

When a Coeus proposal is submitted to the sponsor, the *Development* record is locked and an *Institute Proposal* record is created to await the sponsor's decision. The Institute Proposal record can be edited to include changes to personnel, attach sponsor communications, or budget changes that can occur during the Just-in-Time process. At this time, the full Institute Proposal record is not available in CoeusWeb. However, the Navigating section of this training explores how to view and edit a limited set of Institute Proposal information in CoeusWeb. The Coeus team will continue to build out new functionality as time goes on, including greater access to Institute Proposals. In the meantime, users can continue to access Institute Proposals via Coeus Premium as that has always been view-only for departmental users. Changes to the Institute Proposal should be coordinated with the appropriate OSP Specialist.

Awards and Subcontracts

Similar to Institute Proposals, the Coeus Award information has been view-only in Premium for department users and that will continue at this time. CoeusWeb does not yet contain Award information for departmental users. The same is true for Subcontract information that is automatically brought into Coeus from PEER after both parties sign. This information will eventually be available in CoeusWeb.

Person and Rolodex

A recent addition to CoeusWeb allows departmental users to view contact information for VUMC persons as provided by a nightly data feed from VUMC Human Resources. This feed will continue after WorkDay go-live and this information is generally not editable for Coeus users. However, users can use the CoeusWeb tool to input NIH Commons IDs, ORCIDs, and degree information for VUMC persons. Additionally, Coeus proposal creators can add non-VUMC persons to the Coeus Rolodex from within a new proposal record. After searching for the desired individual and failing to locate an existing record, there is an option to add a new Rolodex person. In situations where the non-VUMC person has changed institutions or contact information, users should create a *new* Rolodex record for the same person instead of trying to edit the old record. This step ensures historical data is not over-written. Both VUMC Person and non-VUMC Rolodex contact information can be updated within specific proposal records by the proposal creator.

PEER

The VUMC PEER system is managed by the VUMC Office of Contracts Management (OCM) and users can request assistance at peer-vumc@vumc.org. The PEER system is a workflow management tool where users can request new contract negotiations or a number of other action items applicable to both OCM and OSP. The relationship between Coeus and PEER will largely remain unchanged after WorkDay go-live. PEER will continue to provide contract information and action item tickets to Coeus and the Coeus team. CoeusWeb does allow a greater degree of interaction between the two systems and there exists a direct web link to relevant PEER records within CoeusWeb proposal summaries.

eCat

The eCat tool was created to facilitate the completion of several NIH and Grants.gov application forms. For example, the NIH Human Subjects and Clinical Trial information form was implemented in 2018 and required a larger volume of new data fields than had historically been collected by Coeus. OSP built the eCat tool to collect and manage those new data elements and reduce the burden on VUMC Investigators and Grants Managers completing the form. The eCat tool was always the same for Coeus Premium and CoeusWeb users. eCat will continue to exist and will become more seamlessly integrated into CoeusWeb.

Navigating

Home screen and widgets

After logging into CoeusWeb, users land on a home screen that includes a toolbar across the top of the screen, a menu down the left, and a set of 'widgets' in the middle of the screen to display pre-determined search results. The toolbar across the top includes access to the Person-edit tool, search features, notifications, current locks, and the new proposal wizard. The widgets contain lists of proposal development records 'pinned' by the user for quick access, the most recently edited records, and those records that have passed their due date without submission (outstanding). Clicking any of these search results will open the record for viewing and editing.

The screenshot shows the CoeusWeb Home screen. At the top is a toolbar with links: Coeus Home, Create New Proposal, Inbox, Tools, My Proposals, and a search bar. A left sidebar contains a menu with items like Coeus Help, Office of Sponsored Programs, Coeus Premium, Coeus Training, VUMC PEER, Subaward Budget Forms, and Grants.gov. The main content area has a 'Welcome to CoeusWeb' message and a 'Welcome to VUMC Coeus!' message. Below these are two widget sections: 'Pinned Proposals' and 'Recent Proposals'. Each section has a table of proposal records with columns for Proposal Number, Title, PI Name, Sponsor Name, and Proposal Status. The 'Pinned Proposals' section has a 'Refresh' button and a pagination control showing '1' of 1 items. The 'Recent Proposals' section also has a 'Refresh' button and shows one record.

Proposal Number	Title	PI Name	Sponsor Name	Proposal Status
M0065489	Shane Demonstration	Crounse,Shane C	National Institute of Allergy and Infectious Diseases	In Progress
M0065959	Shane Testing Forms-H T32	Buble,Michael	National Institutes of Health/Unknown	In Progress
M0065965	Shane Training Demo	Crounse,Shane C	Duke University	In Progress
M0065966	Shane testing 12-19-2022	Crounse,Shane C	National Institutes of Health/Unknown	In Progress

Proposal Number	Title	PI Name	Sponsor Name	Deadline Date	Proposal Status
M0065967	Shane testing budget Edit Mode		National Institutes of Health/Unknown	No date set	In Progress

Person Edit Tool

The VUMC Person edit tool is available from the CoeusWeb Home screen and allows users to view contract information as provided by the nightly data feed from VUMC Human Resources. Users can also view and update NIH Commons IDs, ORCIDs, and degree information for VUMC Persons. The information within this tool is imported whenever the individual is added to a new Coeus proposal record. **It is important to note that copying an old proposal copies whatever information existed in that older proposal and contract information is not automatically updated to reflect the latest person details.** This was true in Coeus Premium as well.

This close-up screenshot focuses on the top toolbar of the CoeusWeb Home screen. It shows the 'Coeus Home' link, 'Create New Proposal' button, 'Inbox' dropdown, and 'Tools' dropdown. A red box highlights the 'Edit Person Details' button, which is located within the 'Tools' dropdown menu.

Search

From the Home screen, CoeusWeb users can use the Quick search box to look for a specific Coeus Proposal Development number or search by PI Name - the two most common searches. Additionally, users can click the 'All Proposals' button which automatically triggers a date-sorted search of all proposals and provides access to more advanced search tools.

After the default search completes, users will see the most recent proposal for which they have permission to access. They can also click the Advanced Search bar to reveal a number of options for narrowing the search results by status, unit, type, investigator, sponsor, funding opportunity, or deadline.

Advanced Search 🔍

Proposal Number: <input type="text"/>	Proposal Type: <input type="text" value="Select"/>	Proposal Status: <input type="text" value="Select"/>	Proposal Title: <input type="text"/>
Lead Unit Code: <input type="text"/>	Lead Unit Name: <input type="text"/>	OSP Administrator: <input type="text"/>	Investigator: <input type="text"/>
Sponsor Code: <input type="text"/>	Sponsor Name: <input type="text"/>	Opportunity ID: <input type="text"/>	Program Title: <input type="text"/>
Search Operator: <input type="text" value="On"/>	Deadline Date: <input type="text" value="mm / dd / yyyy"/>		
Search Operator: <input type="text" value="On"/>	Update Timestamp Date: <input type="text" value="mm / dd / yyyy"/>		
<input type="button" value="Submit"/> <input type="button" value="Clear"/>			

Proposal Search


The current selection criteria will retrieve 3348 records. Only the first 100 rows will be displayed.

Proposal Number	Type	Status	Proposal Title	Lead Unit	Lead Unit Name	OSP Admin	PI	Deadline Date	Sponsor Code	Sponsor Name	Opp ID
M0065967	New	In Progress	Shane testing budget Edit Mode	000001	Vanderbilt University Medical Center				000772	National Institutes of Health/Unknown	
M0065966	New	In Progress	Shane testing 12-19-2022	104081	Animal Care School	Doochin,Crystal Wynne	Crounse,Shane C	2022/12/23	000772	National Institutes of Health/Unknown	PA-HN-R01

Proposal Summary

After clicking to open a Proposal Development record, the user will land on a Proposal Summary screen that is in View-Mode. Section headings can be expanded to reveal a selection of proposal data. A button at the top-right of the screen is available to print expanded sections to a PDF document. If the proposal record has not been submitted, a validation button will also be available to check for errors and warnings. Grants.gov submissions also have a button to print the submission forms. The menu on the left provides access to more detailed areas of the proposal including the budget, narrative attachments, questionnaire, eCat Forms, and tools like permissions and copying. If the user needs to edit the proposal, they can click Edit Proposal to obtain a lock on the proposal and switch into Edit Mode.

The screenshot displays the Grants.gov Proposal Summary screen in View Mode. The interface includes a sidebar on the left with navigation options: 'Exit Proposal', 'Edit Proposal', 'Proposal Summary', 'Budget', 'Attachments', 'Questionnaire', 'eCat Forms', 'Tools', 'Proposal Roles', 'Copy', and 'NEW Copy Proposal'. The main content area shows the proposal details in a grid format. At the top, there are buttons for 'Validate Proposal' and 'Print Application'. The grid contains the following information:

Proposal Number M0065966 Unpin	Investigator Crouse,Shane C	Sponsor National Institutes of Health/Unknown	Prime Sponsor
Lead Unit 104081 : Animal Care School	PEER Log (none)	Proposal Period 01/01/2023 - 12/31/2027	Due Date 12/23/2022
Title Shane testing 12-19-2022	Announcement Title G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial Not Allowed)		Institute Proposal
Announcement Number PA-HN-R01			Agency Routing Identifier (none)

Below the grid, there are expandable sections: 'General Info', 'Grants.gov', and 'Investigator/Key Persons'.

Institute Proposal Connection

After a Proposal Development record has been submitted and locked, the resulting Institute Proposal number will be available on the Proposal Summary screen. Clicking the Institute Proposal number will provide the user with access to summary data points and tools to change the Major Goals description or to change the proposal status to unfunded if appropriate. The Major Goals and Status are editable for users because these data points are relevant to the Other Support report required by some sponsors and available through the VUMC Business Objects reporting tool. Updating a proposal record to unfunded will remove it from the Other Support results and the Major Goals will populate the Other Support report.

Creating Proposals

Wizard

Clicking the Create New Proposal button on the toolbar will launch the new proposal Wizard to walk users through the essential elements of a new proposal. Each of the essential data points is accompanied by definitions and an explanation of the choice. The one irreversible selection is the **Lead Unit** - which should be the managing unit for the proposal and where any resulting financial account will reside. This choice cannot be edited once a proposal is created and the only way to change the choice is to copy the proposal record into a more appropriate unit.

[Coeus Home](#)
[+ Create New Proposal](#)
[Inbox](#)
[Tools](#)

My Proposals

 Crounse,Shane C

Proposal Create

Lead Unit*

Proposal Type*

Activity Type*

Anticipated Award Type*

Title*

Direct Sponsor*

-

Prime Sponsor

Start Date*

mm / dd / yyyy

End Date*

mm / dd / yyyy

Create Proposal

How To Use This Page

^ Lead Unit
 This is the unit that will manage any resulting award and center number. Choose from the drop-down list. Most Coeus users only have permission to one unit. However, if you have access to several - choose the unit that will be responsible for managing the project. This selection cannot be changed after the proposal is created.

v Proposal Type
 v Activity Type
 v Title
 v Sponsor
 v Prime Sponsor
 v Start Date
 v End Date

Menus

Once a new proposal is created using the Wizard, the user will land on the General Info screen. This screen will contain many of the data points entered in the Wizard. Additionally, there will be areas on the General Info screen for Submission Details and the Major Goals.

The screenshot displays the 'Edit Mode' interface for a proposal in CoeusWeb. The top navigation bar includes links for 'Coeus Home', 'Create New Proposal', 'Inbox', and 'Tools'. The left sidebar menu is highlighted with a red box and a red arrow pointing to the 'Submit for Approval' option. The main content area shows the following details:

- Proposal Number:** M0065965 (with a Pin icon)
- Investigator:** Crouse, Shane C
- Lead Unit:** 104204 : Institute of Medicine and Public Health
- PEER Log:** (none)
- Title:** Shane Training Demo
- Save button:** A blue button with a floppy disk icon and the text 'Save'.
- General Info section:**
 - Title:** Shane Training Demo
 - Proposal Type:** New (with a dropdown arrow)
 - Start Date:** 01 / 01 / 2023

The CoeusWeb proposal and budget menus have been designed to be sequential. This means a user can work their way down the menu - completing each section - and be confident they are completing the proposal in an order that won't cause problems. For example, uploading narrative attachments or completing the questionnaire ahead of connecting to Grants.gov will require the user to complete those steps again. However, this does not mean users *must* complete proposal details in the order of the menu. Users can complete proposal components in any order or concurrently as best suits their needs.

Investigator/Key Persons

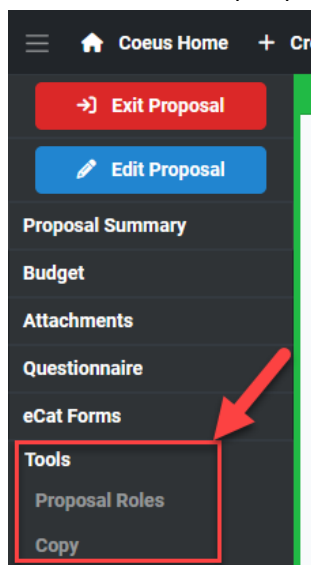
The CoeusWeb Investigator area contains a few features not available in Coeus Premium. There is a Contact Info tab that allows users to view all the contact information for KSP on one screen and identify any missing elements. Effort columns will automatically adjust depending on the type of proposal selected on the General Info screen. For example, the 'Committed Effort' column will only appear for proposal types of 'Continuation' because New submissions will not have established commitments. Similarly, the 'Justification Effort' is only available if the user selects the pencil icon next to the budget effort columns because it may not be required for all investigators on the proposal and is otherwise hidden. Icons to the right of each person allow users to edit contact information, degree information, or remove the individual from the proposal. A blue help icon takes users to a video explainer of all effort columns.

Attachments

The narrative attachments are handled differently in CoeusWeb than in Premium. Instead of biosketches and proposal narratives being uploaded in different areas, all PDFs are uploaded in a single area of CoeusWeb. Users can choose among three tabs to indicate whether an attachment is part of the submission, part of the bio documents, or an internal (institutional) attachment for review purposes. Otherwise, narrative attachments are similar to Premium in that blank placeholders are required at time of submission and can be replaced at any point up until submission.

Tools

At the bottom of the proposal and budget menus, there are optional tools such as the 'Proposal Roles' area, the proposal Copy tool, and the Delete option.



Proposal Roles - manage permissions to a specific proposal record. Aggregators can edit everything in the proposal and route the proposal for approval. Narrative Writers can upload or replace attachments and edit the eCat forms. Viewer users can see, but not edit the proposal and budget.

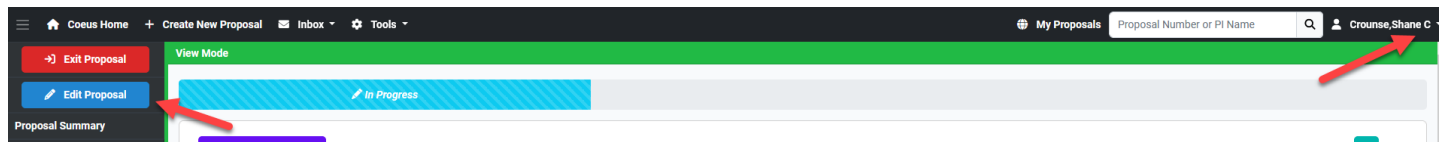
Copy - Make a copy of the open proposal record. Users will be asked in which unit the new proposal should be created. This allows a draft proposal in one unit to be finished in another unit. Copied proposals copy exactly and do not automatically update to reflect new contact information, job titles, unit assignments, budget rates, etc. These items should be carefully reviewed.

Delete - Deleting a proposal record flags the proposal to disappear from search results. Deleted proposals can be recovered by CoeusHelp if needed.

Coeus Locks and Edit Mode

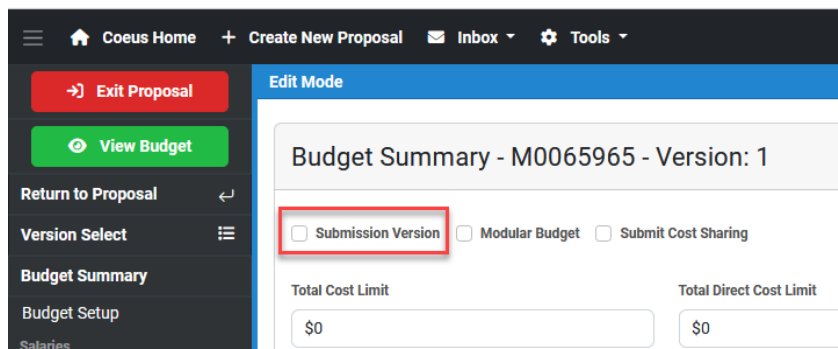
In order to edit a Coeus proposal, users need a 'lock' on the record. Coeus has locks to manage different areas of the development proposal (proposal, budget, attachments) which permits multiple administrators to work on different areas of the proposal simultaneously. To obtain a lock on a development proposal, the user needs to click the blue Edit Mode button. A lock ensures that only one person or Coeus session is editing the data at a time. For example, if a departmental user is uploading new attachment documents, the OSP Specialist will not be able to edit or remove attachments at the same time. When users are finished editing a record, they can switch into View Mode, they can Exit the proposal, or they can logout of Coeus entirely. It is important to note that closing the browser window does none of these things and will not remove proposal

locks. Users can check their own locks at any time by clicking on their name at the top-right of CoeusWeb and viewing their locks. They can also use that tool to remove locks they no longer need. Locks are eventually removed after a period of inactivity. If users experience problems with locks or need to edit a proposal locked by another user, they can contact coeushelp-vumc@vumc.org for assistance.

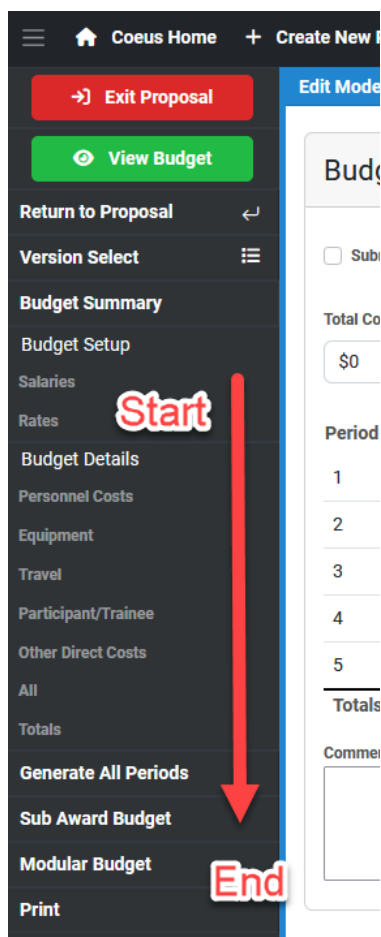


Budget

The Coeus budget has a separate lock from the rest of the proposal and can be edited independently. Users can also create multiple budget versions, just like in Coeus Premium. Whether there is a single budget or multiple versions, the user must specify the 'Submission Version' or the Final as it was known in Premium. This is accomplished with a checkbox on the Version Select screen or within the budget on the Summary panel.

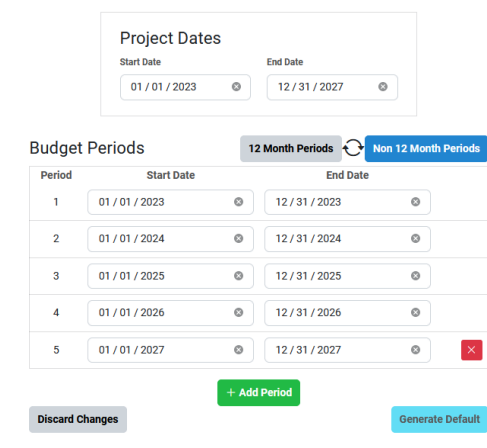
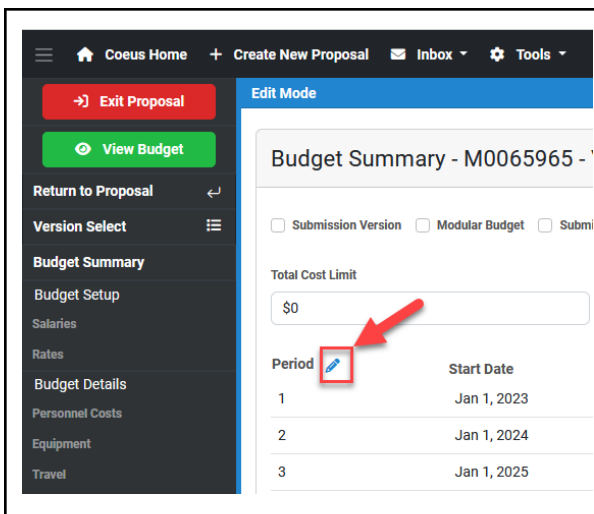


Creating and editing budgets is much easier and faster in CoeusWeb. Users are encouraged to work down the left-side menu to ensure each step is completed. To begin, users establish budget personnel and salaries, before confirming the budget indirect costs, fringe rates, and inflation rates. These two steps occur before creating any budget line items. Of course, any of these can be adjusted later if needed. Once salaries and rates are confirmed, users create budget line items for the full Period 1 budget before generating all the budget periods. Only after all budget periods have been created can a subaward be added using the subaward tool. The subaward tools allowed users to upload a budget form or manually enter direct and indirect amounts in accordance with their particular proposal.



Dates Tool

A small pencil icon on the Budget Summary screen allows users to open the proposal and budget dates tool. This unique feature of CoeusWeb lets users make corrections to both proposal and budget dates at once. This is particularly helpful after copying an older proposal or when correcting a mistake in the initial proposal setup.



Salaries and Rates

The budget Salaries screen is where the annual salary for each budget person is listed along with the effective date of the salary. If needed, multiple salaries can be added for the same person by clicking the green plus (+) symbol and entering the new salary with the appropriate effective date.

Salaries - M0065965 - Version: 1

+ Add New Employee Save

Name	Appointment Type	Base Salary	Effective Date
Crounse,Shane C	12M EMPLOYEE	\$100,000	01 / 01 / 2023

Add salary with diff Effective Date Enter amount

The rate screen allows the user to view and edit the applied rates for their proposal or sync a copied proposal to the most current rates. CoeusWeb does not allow users to update the rate type as that is automatically determined by the sponsor type and activity type on the proposal General Info screen. For example a sponsor of NIH and activity type of research will automatically categorize the budget IDC rate as Modified Total Direct Cost (MTDC) - Research and apply the 75% rate. Users can override the percentage to whatever is needed, but the edited rate will be highlighted Yellow:

Return to Proposal Version Select Budget Summary Budget Setup Salaries Rates Budget Details Personnel Costs Equipment Travel Participant/Trainee Other Direct Costs All

Save Sync to Institute Rates

Overhead Rates Custom Rates

Rate	Year	On Campus	
		Applied	Institute
MTDC, Research On/ Off campus Adjacent	2023	73 %	75%
	2024	73 %	75%
	2025	73 %	75%

Line Items

Budget lines are added by going to the appropriate category, clicking the + Add Line Item button and selecting the Cost Element from the drop down. Cost elements are limited to those items appropriate to the budget category. Additional details can be seen for each line item by clicking the three (3) black dots to the left of each line:

Return to Proposal Version Select Budget Summary Budget Setup Salaries Rates Budget Details Personnel Costs Equipment Travel Participant/Trainee Other Direct Costs All

Period 1 Period 2 Period 3 Period 4 Period 5

Period Summary

Start Dates	End Date	Number of Months	Total Direct Cost	Total Indirect Cost	Total Cost	Direct Cost Limit	Total Cost Limit
01/01/2023	12/31/2023	12	\$22,240.90	\$16,235.86	\$38,476.76	\$0	\$0

+ Add Line Item Save Discard changes

Cost Element	Description	Line Item Cost
60150 - Lab Supplies		\$ 10,000

Add Line Item

Validations

Users can run all proposal validations on the Proposal Summary screen. Clicking the Validations button will run all available validations in accordance with the type of submission. First the internal Coeus validations will run - if there are no errors Grants.gov validations will run next, and finally NIH validations will run if appropriate and if no other errors are found. It is possible that new errors or warnings will appear after the user makes corrections to resolve other validations. There are several hundred validations on some applications and many are dependent on one another. Therefore it is necessary to run validations in sequence and not all at once.

The screenshot displays the 'Proposal Summary' screen in the Coeus system. The top navigation bar includes 'Coeus Home', 'Create New Proposal', 'Inbox', 'Tools', 'My Proposals', and a search bar. The left sidebar lists various options like 'Budget', 'Attachments', 'Questionnaire', 'eCat Forms', and 'Tools'. The main content area shows proposal details for 'Approval In Progress'. A red box highlights the 'Validate Proposal' button. Below the details, a red box highlights a 'Proposal Error' message: 'Unable to generate Grants.gov forms: RR SF 424 V5-0'. At the bottom, three validation panels are shown: 'Coeus Validations' (with a message about the Assignment Form V1-0, V2-0, V3-0), 'Grants.Gov Validations' (with a message to correct proposal errors), and 'eRA Commons Validations' (also with a message to correct proposal errors).

Proposal Summary

Validate Proposal **Print Application**

Proposal Number [REDACTED] **Investigator** [REDACTED] **Sponsor** National Heart, Lung, and Blood Institute **Prime Sponsor**

Lead Unit 104383 : Medicine/Allergy Pulmonary & Critical Care **PEER Log** (none) **Proposal Period** 07/01/2023 - 06/30/2027 **Due Date** 11/05/2022

Title [REDACTED] **Institute Proposal**

Announcement Number PA-20-185 **Announcement Title** NIH Research Project Grant (Parent R01 Clinical Trial Not Allowed) **Agency Routing Identifier** (none)

GRANTS.GOV™

Proposal Error:
Unable to generate Grants.gov forms: RR SF 424 V5-0

Coeus Validations

Form: Assignment Form V1-0, V2-0, V3-0
You have selected the Grants.gov Assignment Form. Institutes mentioned on the form must be participating in the funding opportunity. Please verify.

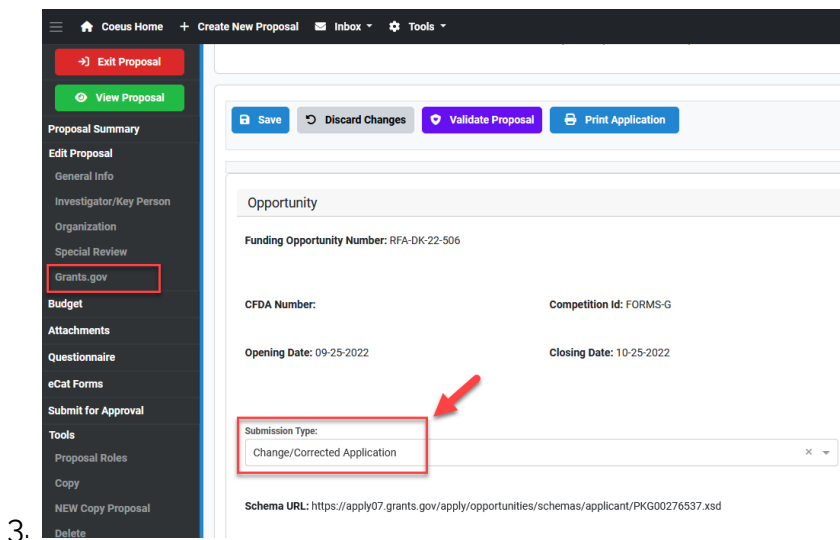
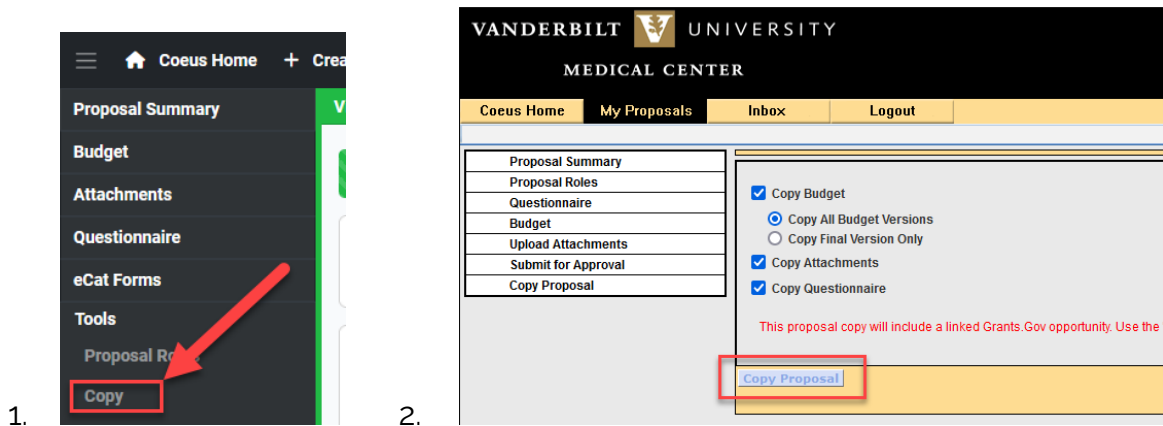
Check if logged in PEER
Unless this is a Changed/Corrected the Proposal should be logged in PEER before routing.
Please correct your Proposal Errors.

Grants.Gov Validations
Please correct your Proposal Errors.

eRA Commons Validations
Please correct your Proposal Errors.

Copying Proposals and Change/Corrected

When a user needs to copy a proposal for either a continuation or a change/corrected submission, they must first open the proposal they wish to copy and then select the 'copy' button at the bottom of the left-side menu. At this time, the copy tool is still the old black and gold of an earlier version, but it works as expected. The proposal will copy and the new version will automatically open for editing. For change/corrected submissions the user should navigate directly to the Grants.gov screen and change the Type to change/corrected. Once this step is done a button will appear to automatically copy the reference numbers from the original submission. If the proposal is *not* a change/corrected, the proposal type should remain 'Application' and the user can proceed to make any required changes. It is important to note that users can copy a budget and choose to select a particular year from the original budget - making things easier for those working on continuation records.



Please contact CoeusHelp-VUMC@vumc.org with any questions or feedback.

END