# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting Your Email Preference</td>
<td>3</td>
</tr>
<tr>
<td>Email Notifications</td>
<td>3</td>
</tr>
<tr>
<td>Locating a Proposal from your CoeusLite Inbox:</td>
<td>4</td>
</tr>
<tr>
<td>Overview of Lite Inbox Items</td>
<td>4</td>
</tr>
<tr>
<td>Actions Available on Inbox Screen</td>
<td>4</td>
</tr>
<tr>
<td>Opening a Record for Review, Approval or Rejection</td>
<td>5</td>
</tr>
<tr>
<td>Approve a Proposal Development Record</td>
<td>6</td>
</tr>
<tr>
<td>Reject a Proposal with Comment (comment is required):</td>
<td>7</td>
</tr>
<tr>
<td>Approval Routing</td>
<td>8</td>
</tr>
</tbody>
</table>
As an Approver, you will automatically receive a notification when a proposal begins workflow and is awaiting your review and approval/rejection.

**Setting Your Email Preference**

By default, when your Coeus user account was created, the email preference was set to “Yes.” This means that any time you receive mail in your Coeus Inbox, the mail will automatically be forwarded to the email address associated with your user account. You have the ability to change this default setting to “No,” however this is NOT recommended.

To change the default setting, you must log into Coeus Premium and from the menu select File>Preferences. This will open the user Preferences window where you will be able to change the default setting.

**Email Notifications**

Notifications will inform you if you are the primary or alternate Approver for a proposal.

With your email notifications preference set to “Yes,” any time you receive email from Coeus, you will have a link to the proposal development record you must review. Below are examples of email messages for both primary and alternate Approvers:

```
This inbox listing opens to a message like one of these:
```

Click on the link within the email notification to be presented with the CoeusLite login window. Enter your JHED ID and JHED password; the proposal record will open directly to the Proposal Summary view.
Locating a Proposal from your CoeusLite Inbox:

Select “Inbox” from the CoeusLite navigation menu:

The default view for your inbox is “Unresolved Messages.”

OVERVIEW OF LITE INBOX ITEMS

Lite Inbox notifications have color coded flags (highlighted) to identify proposals nearing submission deadlines.

- **Red**: These proposals are most urgent; due to the sponsor within two days.
- **Yellow**: Due to the sponsor within four days.
- **Green**: Due to the sponsor within ten days.
- **No Flag**: No deadline date was entered, or the date has passed.

Message Types:

- **Approval**:
  - If you are the primary approver, the message will say, “Please approve this proposal.”
  - If you are an alternate approver, the message will say, “You are designated as an alternate approver for this proposal.”

- **Notification**: Specific notification information also is provided in the Message script. Types of notifications could include:
  - Bypass: Notification that your approval has been bypassed.
  - Narrative Refresh: Changed status of a narrative in an “Approval in Progress” proposal.
  - Custom Notifications: Notices as determined in customized business rules.

ACTIONS AVAILABLE ON INBOX SCREEN:

**Move Selected Messages**:
Enter a check in the checkboxes of proposals you wish to move to the Resolved Messages Box. Only proposals that have been approved or rejected may be moved.
Navigate to the Proposal Summary:
Click on the Proposal Title or Proposal Number to open the summary and approve/reject functions.

Open Resolved Messages:
Click on the Resolved Messages link just under the menu bar.

Search for a Proposal:
Click on the Proposal Search link just under the menu bar.

Opening a Record for Review, Approval or Rejection

Unless following the direct link from an email notification, approvers must navigate from the Inbox to the Proposal Summary screen to review, approve or reject a proposal.

The Summary screen contains an overview of budget and navigation options to help the approver review the proposal.
Approve a Proposal Development Record

On the Proposal Summary screen, click on the “Approve” link:

From the Approval screen, comments and/or attachments may be added; they are not required:

Once added, comments and attachments are listed:
Click on the “Approve” button to finalize the approval, with or without comments or attachments.

Click on the “Back” button to return to the Proposal Summary screen without approving.

Reject a Proposal with Comment (comment is required):

On the Proposal Summary screen, click on the “Reject” link:
Click on the "Reject" button to finalize the rejection.

Click on the "Back" button to return to the Proposal Summary screen without rejecting.

Approval Routing

On the Proposal Routing screen, a text description is displayed after the approver’s name. Status icons are defined in the legend at the bottom of the panel.

Note the change in icon and text status after an action has been taken: