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Introduction to CoeusLite

1. **Coeus Premium vs. CoeusLite**
   
   a. “Premium” requires installation of JHU Citrix server.
   
   b. “CoeusLite” is browser-based and does not require use of Citrix server.

2. **Some Facts:**
   
   a. CoeusLite is completely suitable for creating and submitting proposals.
   
   b. Data entered into CoeusLite or Coeus Premium is stored in exactly the same place – same proposal file – at JHU’s Mt. Washington Central IT Coeus servers.

   c. JHU Pulse login is **required when working off-campus** for both CoeusLite and Premium. This is called the VPN (Virtual Provider Network).

3. **Using CoeusLite in your office vs. Virtual Training courses:**
   
   a. For work:
      
      https://prcoeus.johnshopkins.edu/coeus

   b. For training:
      
      1. https://trcoeus.johnshopkins.edu/coeus
      2. When launching this URL you may get a message like one of these. Simply ‘push’ through the message by selecting ‘More Information’ or ‘Yes’.

   c. **Never use “trcoeus” at work.** Proposals started in “trcoeus” cannot be transferred to “prcoeus”.
Layout of CoeusLite

Launch CoeusLite URL: https://trcoeus.johnshopkins.edu/coeus

1. Home Screen

   ![Image of Home Screen]

   - Public Message
   - Link to ORIS Website and guides
   - ‘My Proposals’ – access your proposals

2. ‘Proposals In Progress’

   ![Image of Proposals In Progress]

3. ‘Create New Proposal’

   ![Image of Create New Proposal]
### Our Research Proposal Scenario

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>United State Geological Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Site</td>
<td>Laboratory #3 will be on the mouth of the Calbuco Volcano, in Chile</td>
</tr>
<tr>
<td>Subaward</td>
<td>Dr. Gloria Hoffman and Morgan State University will build for the project a temperature-controlled suit.</td>
</tr>
<tr>
<td>Lead Unit</td>
<td>SAP Responsible Cost Center 1850000301.</td>
</tr>
<tr>
<td>Special Review</td>
<td>A person, human subject, wearing the suit will be lowered into the volcano.</td>
</tr>
<tr>
<td>Proposal Type</td>
<td>‘New’, because this is the first time the PI has submitted this research to this Sponsor.</td>
</tr>
<tr>
<td>Anticipated Award Type</td>
<td>Sponsor stipulates that funding be in the form of a Grant, not a Contract.</td>
</tr>
<tr>
<td>Deadline Date</td>
<td>Last day on which Sponsor will accept this Proposal is COB December 15, 2021.</td>
</tr>
<tr>
<td>Principal Investigator or PI</td>
<td>You will be the PI, in charge of this research project.</td>
</tr>
</tbody>
</table>
| Co-Investigator or Co-I  | Dr. Scott Zeger [JHU employee]  
                          | Dr. Gloria Hoffman, Site-Investigator [MSU employee]. |
| Other Project Roles      | Dr. Russell Taylor [JHU employee], Lead Engineer. |
Create a New Proposal:

a. Displayed are the Cost Centers (aka Lead Units in Coeus) in which you have necessary roles.

b. Choose the Cost Center corresponding to the SAP Responsible Cost Center in which the Principal Investigator on the proposal will want to expend proposal funds, if awarded. That is, what is the Cost Center in which the SAP Award/Grant will be created by SPSS (Sponsored Projects Shared Services).

c. Never select the wrong cost center!! Email coeus-help@jhu.edu to have a CC assigned.

1. Select “Coeus Class Cost Center” [18500003].

General Info Tab: Overview

In order to save a PD, certain information is required. Those items are marked with a red asterisk in Lite:
1. Note = Lead Unit, Cost Center, number will appear in a header here, once the PD is saved.
2. **Select**: ‘Proposal Type’ = New
3. **Select**: ‘Activity Type’ = Organized Research
4. **Enter**: ‘Start Date’ = January 1, 2022
5. **Enter**: ‘End Date’ = December 31, 2026
6. **Enter**: ‘Proposal Deadline Date’ = November 1, 2021
7. **Select**: ‘Anticipated Award Type’ = Grant
8. **Enter**: ‘Title’ = YOUR last name_C2_Class (example only Morthole_C2_Class); this makes it easy for you to find your proposal in the future.
9. **Check**: ‘Sub Contract’ box

**Save**

**General Info Tab**

1. **Add** Sponsor = U. S. Geological Survey
   i. **Open** Sponsor Search
   
   ![Sponsor Search](image)

   ii. **Locate** “Sponsor Name” Column:
      1. **Enter** asterisk, *
      2. **Enter** “survey”
      3. **Enter** asterisk, *
   
   iii. **Select**
   iv. **Click** on

   ![Sponsor Search Result](image)

   ![Search Again](image)

   ![Close Window](image)

2. **Save**
Organization Tab:

Add to Organization Tab:

1. Every Subaward (i.e. Sub Contract, Sub-recipient)
2. Special Research Facility (follow office policies)

1. Proposal Subaward: Morgan State University
2. **Select** ‘Add Organization/Location’ (to Add Morgan State University)

   a. **Four Steps:**
      1. **Select**

2. **Select** ‘Find Address’
a. **Notice** this is a search of Coeus Rolodex database

![Image of Coeus Rolodex database search interface]

3. **Enter** the Organization field: Morgan*

4. **Select** [Add District]
   a. **Enter** Congressional District = “MD-007” (format is important)

3. **Special Research Facility proposed to be used for this project**
   a. **Rolodex record search:** *ministerio*
   b. **Enter** Location Name: Chilean Volcano
   c. **Enter** Congressional District = “00-000” (for locations without a Congressional District)
   d. **Review**

![Image of Coeus Rolodex database search interface for Special Research Facility]

Investigator/Key Study Persons Tab

a. **Remember:** All Proposal persons are entered as Key Persons – **except**
   1. JHU Employees
   2. AND have the Proposal Role of Principal Investigator or Co-Investigator.

b. Coeus will not let you submit the proposal if you violate this rule.

1. **Employee Search | Non Employee Search**
   a. **Employee Search:** search for JHU employees. Fed to Coeus from SAP HR.
   b. **Non-employee Search:** search non-JHU persons. Person search of Coeus Rolodex.

2. **Overview of Fields**
Enter Proposal persons:

1. Principal Investigator:
   a. You (JHU employee)

2. Co-Investigator:
   a. Dr. Scott Zeger (JHU employee)
   b. **Never** select both “Co-Investigator” and “Non Employee Search”

3. Key Persons:
   a. Dr. Russell Taylor (JHU employee, Project Collaborator)
   b. Dr. Gloria Hoffman (Not JHU employee, Project **Co-Investigator**)

Yellow = complete ‘Effort’ fields per office policies.
1. Select **Investigator** Tab.


3. Select **= Certify Button**.

4. See **= all Proposal Persons**.

5. Answer Questions = corresponding to double carrots “>>”.

6. Select = Return to Investigator, when finished.

7. Confirm = Green Checkmarks.

8. Select **Remove to remove person from proposal**.
Special Review Tab

a. Purpose of special reviews

b. Special Reviews:

Note: Some special review types are validated against Special Review questions in the compliance questionnaires, while others simply apply a key word to the PD to ease certain reporting (foundation relations and space change)

1. Click = Special Review field.
2. Select = “Human Subject”.
4. Save.
Others Tab

1. **Enter** = Proposal Contact (you).
2. **Enter** = ‘SAP Resp Cost Center’:
   a. ‘18500003’ Proposal Lead Unit + ‘01’ the 9th & 10th digits of SAP R CC.

Proposal Roles Tab

1. **“Aggregator”** = list of person who ‘co-own’ proposal. An aggregator can submit a PD.
2. **“Add User”** = to add a ‘co-owner’ to this Proposal.
3. **“Remove”** = only for this PD, withdraw a user’s access from this Proposal.
1. **Every Proposal requires completion of:**
   a. **MIQ**, Mandatory International Questionnaire
   b. **MCQ**, Mandatory Compliance Questionnaire

2. **Certain Proposals have an addition questionnaire:**
   a. **CCQ**, Conditional Compliance Questionnaire
   b. When Proposal Type is: New, Renewal, Supplement, Resubmission, and Task Order.
   c. That is, when proposal is asking for $$ not previously requested in Coeus.

3. **Open CCQ:**

4. **Select “More” (to view full questions and additional information)**
Budget Tab

1. **Select** Budget Tab

   a. **Note:** The Budget Tab may open to one of several windows. You want to get to ‘Budget Summary’ window. If after you select Budget Tab and some other window appears MERELY PUSH through them – by click ‘Ok’, ‘Yes’, etc. – until ‘Budget Personnel’ appears like this:

   ![Budget Personnel Window]

   b. **Select** Budget Summary

   ![Budget Summary Window]
1. **Overview of Budget Summary window**

![Budget Summary Window](image)

2. **Complete budget process by entering your budget spreadsheet summary data into Coeus:**

   1. **VERIFY/EDIT Indirect Cost RATE** (in Proposal Rates window).
      
      a. **IDC Rate** = MTDC, On Campus, 10%.

   2. **Enter Direct Costs** (in Direct Cost Column).
      
      a. **DC $$** = $150,000.00 each period.

   3. **Enter Indirect Costs** (in Indirect Cost Column).
      
      a. **IDC $$** = $15,000.00 each period.

   4. **Check** Final Box.

   5. **Change** Budget Status to Complete.

   6. **Check** Final Box.

   7. **Change** Budget Status to Complete.

   8. **Save**

   9. **Upload** Budget Spreadsheet (next section).

   10. **Return to Proposal**
1. **Overview**

<table>
<thead>
<tr>
<th>Proposal Summary</th>
<th>Investigator: Morthole, Ellen P</th>
<th>Proposal #: 00152661 (In Progress)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Info</td>
<td>Agency/Sponsor: Morthole_C2_Class</td>
<td>Proposal Period: 01/01/2022 - 12/31/2026</td>
</tr>
<tr>
<td>Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investigators/Key Persons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Roles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Questionnaire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCQ Conditional Compliance Questionnaire</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Budget</td>
<td>Upload Attachments</td>
<td></td>
</tr>
</tbody>
</table>

**Upload Proposal Attachments**

**Add Documents**

- **Attachment Type**: Please Select
- **Description**: 
- **File Name**: ![](image.png)
- **Complete**: 
- **Save**

**List of Proposal Attachments**

- **Attachment Type/File Name**: 
  - Narrative
  - Facilities
  - Equipment
  - Bibliography and References Cited
  - Project Summary
  - Budget Justification
  - Additional Equipment
  - Personal Data
  - Budget Spreadsheet

**Proposal Details**

- **Proposal Summary**
- **General Info**
- **Organization**
- **Investigators/Key Persons**
- **Special Review**
- **Others**
- **Proposal Roles**
- **Questionnaire**
  - CCQ Conditional Compliance Questionnaire
  - MIQ Mandatory International Questionnaire
  - MCQ Mandatory Compliance Questionnaire
- **Upload Attachments >>**
Remaining Tabs in Navigation Panel

a. **SUBMIT FOR APPROVAL**
   i. Select to start routing.
   ii. Validations will run on PD prior to submitting
   iii. Must clear out all validation errors to Submit.
   iv. Can Recall & resubmit.

b. **DELETE PROPOSAL**
   i. You, when PD Status is ‘In Progress’.
   ii. ORIS, if PD has been routed for Approval.

c. **ADD NEW ROLODEX ENTRY**

d. **ORIS PROPOSAL SUMMARY FORM (report)**
e. **ORIS QUESTIONNAIRE LIST**

f. **UPDATE INVESTIGATOR TRAINING**

g. **REQUEST NEW SPONSOR**
Some Key Points

1. Always access CoeusLite in the office using the URL https://prcoeus.johnshopkins.edu/coeus?
   a. True
   b. False

2. Before starting a Coeus proposal you must find out the SAP Responsible Cost Center in which the PI will want to expend proposal funds, if awarded?
   a. True
   b. False

3. If that Cost Center does not appear when you start a proposal, just select any cost center?
   a. True
   b. False

4. If that Cost Center does not appear when you start a proposal email coeus-help@jhu.edu?
   a. True
   b. False

5. A JHU employee who is Co-Investigator on a proposal is entered as a Key Study Person?
   a. True
   b. False

6. A significant reason to create a practice proposal in Production Coeus is to confirm that you have roles assigned in the correct Cost Center(s)?
   a. True
   b. False

7. The Proposal Type selected specifies, in effect, the reason the proposal is being submitted?
   a. True
   b. False

8. The reason a Coeus Proposals is created is to convey research project information to your Research Administration so the Dean will submit the proposal to the sponsor on behalf of the Principal Investigator?
   a. True
   b. False

9. The Proposal Summary Form, is the only proposal report available in Coeus?
   a. True
   b. False

10. On the Proposal Summary Report, fields shaded Yellow indicate information provided which may be either in error or requires a “closer look” from the JHU administration
    a. True
    b. False
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