# COEUS LITE  v4.4.4.1



# Proposal Development: The Proposal Approver Addendum

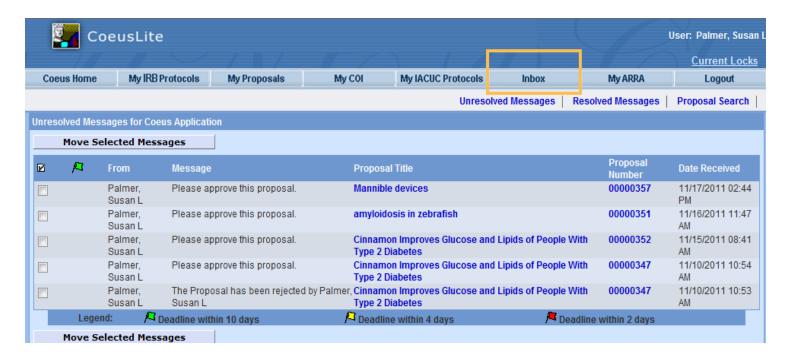# Table of Contents

# Knowing When a Proposal is Available for Review

There are two ways that notification is delivered, through the COEUS Inbox and to your email address.

### *Notifications in the COEUS Inbox*

Choose the Inbox tab from the module selection menu on the top of the screen:
Click Inbox



Above is the default view, which shows all Unresolved Messages. Note that messages cannot be deleted, completed items may be removed from this view by, selecting the check box near the item and then click Move Selected Messages.  The approval notifications cannot be moved to the Resolved Messages until they are approved or rejected.

**Scroll** to see all inbox items

Listed items in the Unresolved Message Box:
- **Primary Approver** message will ask you to "Please approve this proposal"
- **Alternate Approver** message will note that you are designated as an alternate approver.

Approval notifications have flags to help identify proposals nearing their submission deadline. Red flags are most urgent, followed by Yellow, then Green. *No* flag could mean the proposal is beyond the range or has NO due date entered. Users *MUST* insert a Due Date to support the flag function.



- **Bypass Notifications**: if your approval has been bypassed, COEUS will send a notification of bypass.
- **Uploaded file refresh Notifications**: approvers are notified if uploaded files are replaced during proposal routing.

**Custom Notifications**: Business rules can be created to automatically notify if the defined conditions are met. Please contact COEUS-Help@drexel.edu if you would like to create custom notifications.

Blue words/ numbers are links that when clicked take you to the approval screen of a particular proposal.
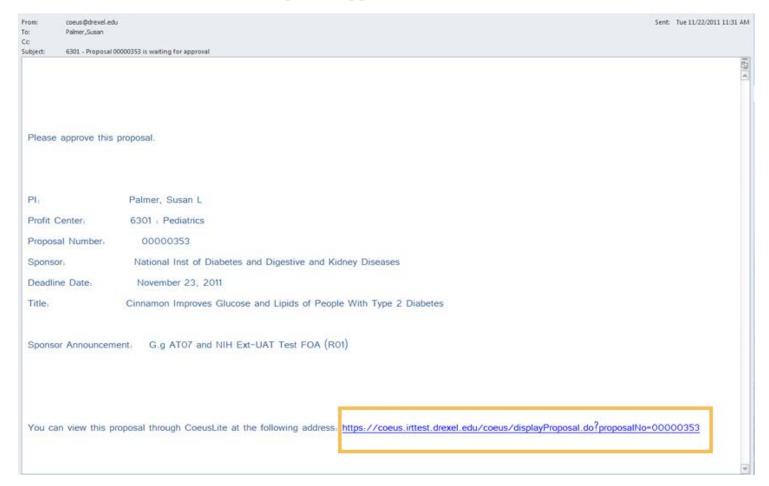
- The Resolved Messages screen shows completed and moved notifications
- Search for a specific proposal: select Proposal Search to launch a search of all COEUS proposals.

## *Emailed Notification*

By default, when your COEUS user account was created, the email preference was set to Yes. This means, anytime you receive mail in your COEUS Inbox, the mail will automatically be forwarded to the email address associated with your user account.

- Approval notifications will inform you if you are the Primary or Alternate approver.

With your email notifications preference set to Yes, anytime you receive email from COEUS, you will have a link to the specific proposal development record sent to your email address.

From: coeus@drexel.edu
To: Palmer,Susan
Cc:
Subject: 6301 - Proposal 00000353 is waiting for approval
Sent: Tue 11/22/2011 11:31 AM

Please approve this proposal.

PI: Palmer, Susan L
Profit Center: 6301 : Pediatrics
Proposal Number: 00000353
Sponsor: National Inst of Diabetes and Digestive and Kidney Diseases
Deadline Date: November 23, 2011
Title: Cinnamon Improves Glucose and Lipids of People With Type 2 Diabetes

Sponsor Announcement: G.g AT07 and NIH Ext-UAT Test FOA (R01)

You can view this proposal through CoeusLite at the following address: https://coeus.irttest.drexel.edu/coeus/displayProposal.do?proposalNo=00000353

Select the link and you will be presented with the COEUSLite login window. Enter your LDAP ID and password, then COEUS will take you directly to the specific record.
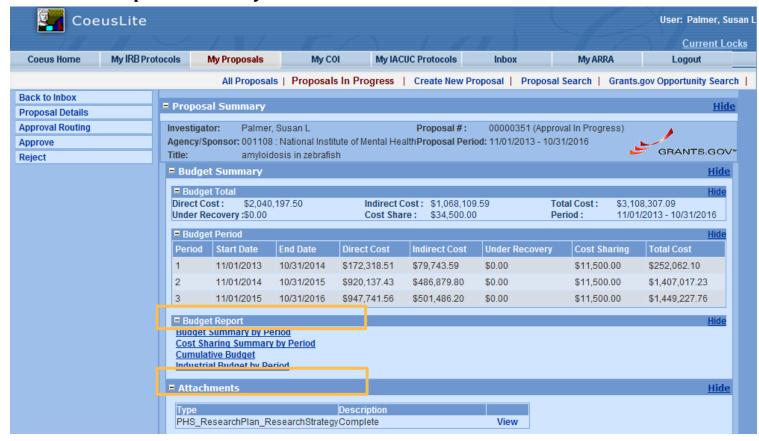
## Reviewing a Proposal

Approvers must navigate to the Proposal Summary screen to approve or reject an Approval in Progress proposal. This Summary screen contains an overview of the Budget and navigation options to help the approver review the proposal.

### *Select a Proposal to Review*
- Selecting a proposal **from your COEUS Inbox** will navigate to the Proposal Summary screen
- Selecting the link from an **email notification** will navigate to the Proposal Summary screen
- Selecting a proposal **from a Search** result will open the Proposal Details screen.

Select a file to generate the PDF file in a new browser window

## *Review the Proposal Summary*



Use the budget reports and the attachments section to quickly review the proposal budget and science, or navigate to the proposal details screen.

Actions available on this screen:

| | |
|---|---|
| Back to Inbox | Return to the Inbox: select Navigation button |
| Proposal Details | Navigate to the full proposal: select Navigation button |
| Approval Routing | View the Approval Routing Map: select Navigation button |
| Approve | Approve the proposal: select Navigation button |
| Reject | Reject the proposal: select Navigation button |
| ⊟ Budget Report | Create a budget report from this proposal's budget<br>•Summary by Period – a detailed report of all expenses by line item, all calculated rates and exclusions are displayed (each period reported separately).<br>•Cost Sharing Summary by Period: Summary plus a line by line view of cost sharing, if any (each period reported separately).<br>•Cumulative Budget: less detail than Summary; cumulative expenses of all budget periods.<br>•Industrial Budget by Period: less Salary and Fringe details than Summary. |
| ⊟ Attachments | Open a proposal's uploaded attachment in a separate browser window. |

| | |
|---|---|
| **Proposal Details** | Proposal Details: select to open the COEUS Proposal Development record in view mode. Approvers are authorized to view all screens in the Development proposal. (refer to the full COEUS Lite Proposal Development User Guide) |

**Approval Routing**: select to view the routing map applied to this proposal.



Select **Show** to expand the approval routing stop details
Select **Hide** to collapse the approval routing stop details.
Select **Hierarchy** to view an alternate presentation of the routing
A text description of the status is displayed after the approver's name. Status Icons are defined in the Legend at the bottom of the panel.

# Approve Proposal

Select **Approve** to open the Approve entry screen

## Approval window options:
Adding Approval Comments or Attachments are optional.
If an attachment is added, a description is required.

## *Approval Comments:*

Enter comments in the Add Comments pane, if desired.
Add additional comment(s) by selecting **Add**

## *Approval Attachments:*

Add an Attachment file to remain with this proposal record (not submitted to sponsor):
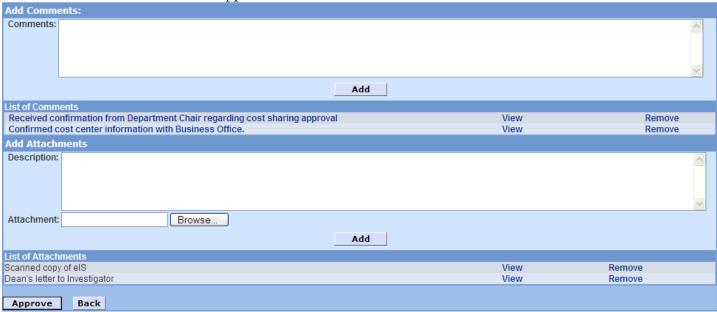
Select **Browse** and locate the file on your desktop, Save when located.
Type a **description** of the uploaded file in the Description pane (required).
Select **Add** to complete the process.
**Add** another attachment by selecting **Browse;** follow the same search and save process.

Select **Approve**  button to approve the proposal, with or without comments or attachments.
Select **Back** to Close the window without approving and return to Proposal Summary by using the **Back** button.

List of Comments created when approver uses Add between entries.

# Approval Options
**Premium Only**
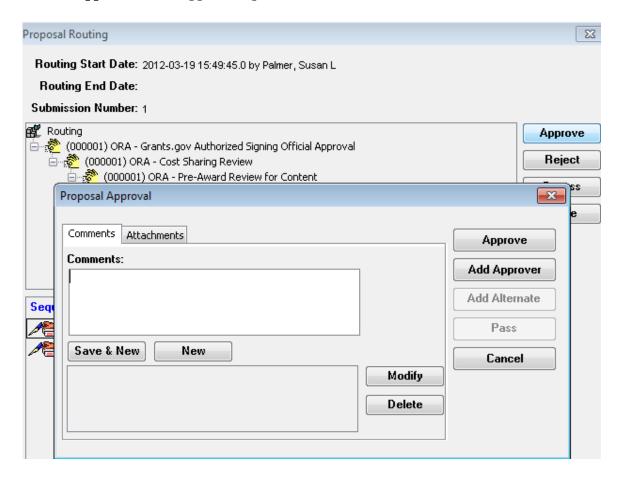
The Add Approver function gives the option to add people who do not usually appear in an approval map. This newly added person will be may be added to View, Approve or Reject the proposal during the routing process.

If you are the Primary Approver at multiple routing levels, at your first approval a prompt will offer to let you approve for all of your primary approval stops (not where you are an alternate approver). If you select "No," you will be notified when the proposal arrives at your next routing sequence, and you must approve again at that stop.

## *Approval Routing Map*

Open the approval routing map to see all of the approval variations that appear at the same level that allows your approval/ rejection.

- From the Proposal Details Screen, choose **Action→ Approval/Rejection**
- Click **Approve** to see Approval options:
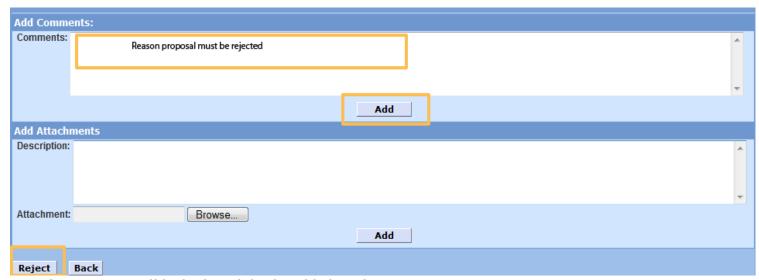
# Reject Proposal

Select **Reject** to open the Reject entry screen.
Type comments in the **Add Comments** pane, a comment is required for rejection.

## *Rejection Comments:*

Enter comments in the Add Comments pane.
Add additional comment(s) by selecting **Add**



List of Comments will be built and displayed below the entry pane.

## *Rejection Attachments:*

Add an Attachment file to remain with this proposal record (not submitted to sponsor):
  Select **Browse** and locate the file on your desktop, Save when located.
  Type a **description** of the uploaded file in the Description pane (required).
  Select **Add** to complete the process.
  **Add** another attachment by selecting **Browse;** follow the same search and save process.
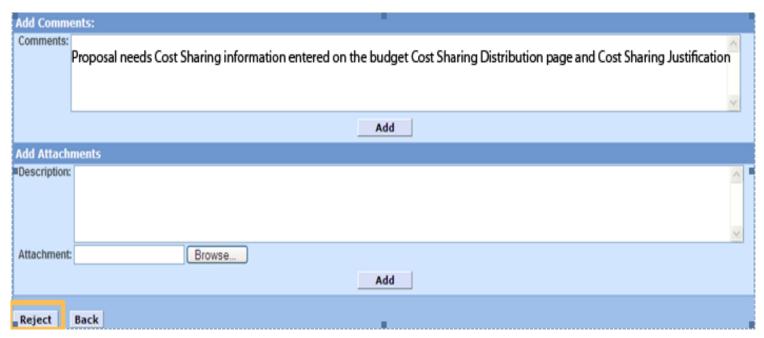
List of Attachments will be built and displayed below the entry pane.

Select **Reject** button to return the proposal for modification.
Select **Back** to Close the window without rejecting and return to Proposal Summary by using the **Back** button.

# Approval Routing

Through the approval routing it is possible to see the Current Status, as well as who has and has not approved the proposal.
A text description of the status is displayed after the approver's name. Status Icons are defined in the Legend at the bottom of the panel.

Approved proposal:

**Department Required for Proposal Approval**

Below is the list of the Approvers who are required to approve this proposal before it may be submitted to the agency.

**(000001) ORA - Final Review and Submission**                    Hide
| | | | |
|---|---|---|---|
| Chaiken, Ryan S | Approved | Comments | Attachments |
| Taylor, Jennie A | Approved by other | | |
| Levy, Stacia C | Approved by other | | |
| King, Claire A | Approved by other | | |
| Edwards, Michael T | Approved by other | | |

**(000001) ORA - Cost Sharing Review**                    Hide
| | | | |
|---|---|---|---|
| Levy, Stacia C | Approved | Comments | Attachments |
| Groshon, Patricia A | Approved by other | | |
| Taylor, Jennie A | Approved by other | | |
| Edwards, Michael T | Approved by other | | |

**(000001) ORA - Pre-Award Review for Content**                    Hide
| | | | |
|---|---|---|---|
| Chaiken, Ryan S | Approved | Comments | Attachments |
| Taylor, Jennie A | Approved by other | | |
| Levy, Stacia C | Approved by other | | |

**(000001) ORA - Export Control Compliance Review**                    Hide
| | | | |
|---|---|---|---|
| Ford, Julia J | Approved | Comments | Attachments |
| Devine, Timothy John | Approved by other | | |

**(2003) COE Dean**                    Hide
| | | | |
|---|---|---|---|
| Dandekar, Kapil R | Approved | Comments | Attachments |
| Burnside, Holly Carol | Approved by other | | |

**(3667) Mechanical Engineering and Mechanics**                    Hide
| | | | |
|---|---|---|---|
| Oh, Paul Yu | Approved | Comments | Attachments |
| Kneller, Geri | Approved by other | | |

**(3667) Investigators**                    Hide
| | | | |
|---|---|---|---|
| Friedman, Gennady | Approved | Comments | Attachments |
| Dobrynin, Danil V | Approved | Comments | Attachments |
| Fridman, Alexander | Approved | Comments | Attachments |

Refer to legend for translation of icons:

| | |
|---|---|
| Approved by the normal approver | Primary Approver |
| Approved by alternate | Alternate Approver     Approved |
| Approved by other, not the primary or other alternates | Approved by other |