

Office of Research and Sponsored Programs

Coeus



Proposal Development
Focus Group

Welcome!

April 20th Focus Group Agenda

- **Introductions**
- **Brief Overview of Coeus and the Coeus Consortium**
- **Announcement of UMDNJ-Rutgers Coeus Collaborative Efforts**
- **Coeus Proposal Development “Staggered Approach” Implementation Plan**
 - **Server Hardware Upgrade and Centralized IT Support** (*ongoing*)
 - **Coeus Notification/Routing/Approval Flow Functionality** (*ongoing*)
 - **Coeus LDAP Net Id Integration** (*future*)
 - **Coeus Proposal Preparation Functionality – Budgets and more...** (*future*)
 - **S2S with Grants.gov** (*future*)
- **Brief Coeus Demo**
- **Sample Coeus Set Up Notification/Approval Hierarchy Form**
- **Coeus Website**
- **Focus Group Feedback**

Overview of Coeus Application

- **COEUS** is an enterprise wide, cradle to grave electronic system developed by MIT whose purpose is to simplify and make more efficient, proposal development and pre- and post-award management.
- Rutgers University ORSP currently utilizes the Proposal Log, Institute Proposals, Awards and Subcontracts Modules
- Our Goal: **Proposal Development and S2S!**

Coeus Licensees – We are **NOT** alone!

- Arizona Research Labs|||Spelman College[Arizona State University](#)|||Stanford UniversityArizona Research Laboratories
 |||Texas A&M UniversityAuburn University|||Texas Transportation InstituteBoston Medical Center |||The Jackson
 LaboratoryBoston University Medical Campus|||Translational Genomics Research Institute (TGen)Brown University|||TTI
 Network ServicesCalifornia Institute of Technology|||UMASS Medical SchoolCarnegie Mellon University |||Uniformed
 Services University of the Health SciencesChicago State University|||University of British Columbia Children's Hospital
 Boston|||[University of California-Berkeley](#)Clark Atlanta University|||University of California-DavisColumbia
 University|||University of California-Los AngelesCornell University|||University of California-RiversideDana-Farber Cancer
 Institute|||University of California-San DiegoDartmouth College, Trustees of|||University of California-San Francisco[Desert
 Research Institute](#) |||University of ChicagoDuke Health Technology Solutions|||[University of Cincinnati](#)Educational
 Development Center|||University College London Educational Testing Services|||University of Colorado-DenverFred
 Hutchinson Cancer Research Center|||University of FloridaGeorge Mason University|||University of GeorgiaGeorgia
 Institute of Technology|||University of the Health ServicesHarvard University|||University of Hong KongHenry M. Jackson
 Foundation|||University of Houston-ClearlakeIndiana University|||University of Illinois/Board of TrusteesIowa State
 University|||University of Illinois-Urbana-ChampaignThe Jackson Laboratory|||University of IowaJackson State
 University|||University of MarylandJohns Hopkins University|||University of Maryland-BaltimoreKPMG Peat Marwick LLP
 |||University of Maryland-Baltimore CountyLehigh University|||University of Massachusetts-Lowell Research Fund.Loyola
 University|||University of Massachusetts Medical SchoolMedical College of Georgia|||University of MemphisMemorial
 Sloan-Kettering Cancer Center|||University of Memphis-FoundationMethodist Hospital Research Institute |||University of
 MinnesotaMississippi State University|||University of Missouri-ColumbiaMorehouse College|||University of NebraskaMurray
 State University|||University of Nevada-RenoNational University of Singapore|||University of New Hampshire Ohio
 University|||[University of North Carolina-Chapel Hill](#)Old Dominion University Research Foundation|||University of Notre
 Dame [Princeton University](#)|||University of Oxford[Purdue University](#)|||University of PittsburghResearch Foundation of SUNY-
 Albany|||[University of Rochester](#)Research Foundation of SUNY-Brooklyn|||University of South AlabamaResearch
 Foundation of SUNY at Buffalo|||University of Tennessee **Rutgers University** |||University of Texas Health Science
 Center at Houston Southwest Foundation for Biomedical Research|||Stanford UniversityUniversity of Vermont|||Vanderbilt
 UniversityUniversity of Washington|||Whitehead InstituteUniversity of Wisconsin Medical School|||William Marsh Rice
 UniversityUT Health Science Center at Houston|||Washington UniversityValdosta State University|||Whitehead
 InstituteUniversity of Vermont|||William Marsh Rice UniversityUniversity of Washington|||Virginia Commonwealth University-
 MCV/VCUUniversity of Wisconsin Medical School|||Woods Hole Oceanographic InstituteWashington University|||Worcester
 Polytechnic InstituteWayne State University|||Yale University Weill Medical College of Cornell University|||Virginia
 Commonwealth University-MCV/VCU|||Woods Hole Oceanographic Institute

And we have a new Collaborative Partner!

- Arizona Research Labs|||Spelman College[Arizona State University](#)|||Stanford UniversityArizona Research Laboratories
 |||Texas A&M UniversityAuburn University|||Texas Transportation InstituteBoston Medical Center |||The Jackson
 LaboratoryBoston University Medical Campus|||Translational Genomics Research Institute (TGen)Brown University|||TTI
 Network ServicesCalifornia Institute of Technology|||UMASS Medical SchoolCarnegie Mellon University |||Uniformed
 Services University of the Health SciencesChicago State University|||University of British Columbia Children's Hospital
 Boston|||[University of California-Berkeley](#)Clark Atlanta University|||University of California-DavisColumbia
 University|||University of California-Los AngelesCornell University|||University of California-RiversideDana-Farber Cancer
 Institute||| **UMDNJ** University of California-San DiegoDartmouth College, Trustees of|||University of California-San
 Francisco[Desert Research Institute](#) |||University of ChicagoDuke Health Technology Solutions|||[University of
 Cincinnati](#)Educational Development Center|||University College London Educational Testing Services|||University of
 Colorado-DenverFred Hutchinson Cancer Research Center|||University of FloridaGeorge Mason University|||University of
 GeorgiaGeorgia Institute of Technology|||University of the Health ServicesHarvard University|||University of Hong
 KongHenry M. Jackson Foundation|||University of Houston-ClearlakeIndiana University|||University of Illinois/Board of
 TrusteesIowa State University|||University of Illinois-Urbana-ChampaignThe Jackson Laboratory|||University of
 IowaJackson State University|||University of MarylandJohns Hopkins University|||University of Maryland-BaltimoreKPMG
 Peat Marwick LLP |||University of Maryland-Baltimore CountyLehigh University|||University of Massachusetts-Lowell
 Research Fund.Loyola University|||University of Massachusetts Medical SchoolMedical College of Georgia|||University of
 MemphisMemorial Sloan-Kettering Cancer Center|||University of Memphis-FoundationMethodist Hospital Research Institute
 |||University of MinnesotaMississippi State University|||University of Missouri-ColumbiaMorehouse College|||University of
 NebraskaMurray State University|||University of Nevada-RenoNational University of Singapore|||University of New
 Hampshire Ohio University|||[University of North Carolina-Chapel Hill](#)Old Dominion University Research
 Foundation|||University of Notre Dame [Princeton University](#)|||University of Oxford[Purdue University](#)|||University of
 PittsburghResearch Foundation of SUNY-Albany|||[University of Rochester](#)Research Foundation of SUNY-
 Brooklyn|||University of South AlabamaResearch **Rutgers University** || Foundation of SUNY at Buffalo|||University of
Tennessee ||University of Texas Health Science Center at Houston Southwest Foundation for Biomedical
 Research|||Stanford UniversityUniversity of Vermont|||Vanderbilt UniversityUniversity of Washington|||Whitehead
 InstituteUniversity of Wisconsin Medical School|||William Marsh Rice UniversityUT Health Science Center at
 Houston|||Washington UniversityValdosta State University|||Whitehead InstituteUniversity of Vermont|||William Marsh Rice
 UniversityUniversity of Washington|||Virginia Commonwealth University-MCV/VCUUniversity of Wisconsin Medical
 School|||Woods Hole Oceanographic InstituteWashington University|||Worcester Polytechnic InstituteWayne State
 University|||Yale University Weill Medical College of Cornell University|||Virginia Commonwealth University-
 MCV/VCU|||Woods Hole Oceanographic Institute

UMDNJ – Rutgers Coeus Collaborative Efforts

- Two heads are better than one...



- Our Joint Goal: **Proposal Development and S2S!**
 - Shared Coeus Training and Documentation efforts
 - Shared IT support and cooperation
 - Shared common research business practices
 - Self Help Joint Listserv

“Staggered Approach” Coeus Implementation Plan

- Server Hardware Upgrade and Centralized IT Support
 - In Process...
- Coeus Notification/Routing/Approval Flow Functionality
 - In Process...
- Coeus LDAP Net Id Integration
 - Planning Stage
- Coeus Proposal Preparation Functionality – Budgets and more...
 - Future Implementation Layer
- S2S with Grants.gov
 - Future Implementation Layer

Server Hardware Upgrade & Centralized IT Support

Excerpt from “ORSP Fault Tolerant Portal Plan”

ORSP has limited IT support staff. With a single FTE shared among the entire building, IT support is based on a best-effort 8x5 schedule. Therefore, it is advantageous to locate the new Coeus server within the [Administrative Computing Services \(ACS\)](#) group of OIT.

ACS is the university IT unit responsible for the design, implementation, operation, maintenance and evolution of systems and services that support "business" computing at the university. The ACS data center at ASB I has the required environmental and support controls (i.e. HVAC, UPS power, back-up generator, raised floor space, redundant communications, and 24x7 support.)

Once in production, the pre-proposal submission system should be treated as any other major Rutgers business application. Examples of other systems managed by ACS are RIAS, course & room scheduling, financial accounting, payroll, etc. The pre-proposal submission system is equivalent to these other applications in terms of essential business processes of the university.

Coeus Notification/Routing/Approval Flow Functionality

- **COEUS** routing and business rules simulate an institution's business practices.
 - Routing is the process of electronically moving a proposal through an institution with the end result being that a proposal is ready for submission to a sponsor.
 - Rules are tests that determine how a proposal is to be routed.
 - Maps are tied to units, units can have multiple maps
 - Maps are made of stops or levels, maps may contain one or more users
 - Routing is based on an institutions unit hierarchy
 - Each level of the hierarchy can have it's own maps
 - As the proposal moves up the hierarchy each units rules will be evaluated and the appropriate maps are inserted into the routing

Coeus Approval/Notification Reference Form

- ORSP will work with each of the departments in the focus group to assist in setting up their Coeus approval/notification business rules and maps.
- The business rules and maps will be built based on information provided as to organizational structure through classes and departmental interviews. Once created, these maps and rules will be maintained by Coeus Departmental “super users” and ORSP.
- Electronic routing and approval **eliminates** the need to walk the paper copy of the **endorsement form** around campus for required signatures!



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Coeus Approval/Notification Reference Form

Department/Unit: _____

Business Manager: _____

Department Head: _____

Dean: _____

Standard Approval/Submission Flow typically consists of:

P.I. → Department Head → Dean → O.R.S.P. → Sponsor

Factors which will affect the Approval/Notification Routing Process (ORSP requirements):

Does Proposal involve Humans or Animals - Approval Needed from → **Compliance**

Does Proposal involve Bio Hazards - Approval Needed from → **REHS**

Is the Proposal being submitted to a Private for Profit Sponsor → **RU Foundation**

Is the Proposal being submitted to a Corporate Sponsor → **OCLTT**

Approval/Notification Routing Rules can be tailored to individual Departmental Requirements:

Examples of Coeus Business / Routing Rules (Question Based/Column Based):

Question Based

Does the proposal involve additional space or space alteration? → **Y/N**

Does the proposal involve participation by foreign nationals → **Y/N**

Does the proposal involve submission to a foreign entity sponsor → **Y/N**

Column Based

Is the proposal total \$ amount greater than a pre-set dollar limitation? → **TOTAL_COST**

Does the proposal involve departmental cost sharing? → **COST_SHARE_AMOUNT**

Does the proposal contain a specific budget code? → **COST_ELEMENT**

Is the Proposal of a specific type? (New? Resubmission?) → **PROPOSAL_TYPE**

Coeus Related Web Links

- The Coeus Consortium website:
 - <http://www.coeus.org/coeus-cons/index.html>
- Coeus Institute websites:
 - Princeton <http://www.princeton.edu/%7Eorpa1/coeus/>
 - Purdue <http://www.purdue.edu/coeus/general/>
 - ASU <http://researchadmin.asu.edu/coeus/index.cfm>
 - Brown [http://www.research.brown.edu/rschadmin/
coeus_support_page.php](http://www.research.brown.edu/rschadmin/coeus_support_page.php)
- Rutgers Coeus Test URLs:
 - Coeus Premium <https://165.230.179.148:8443/coeus/coeus.inlp>
 - Coeus Lite <https://165.230.179.148:8443/coeus/coeuslite/mit/irb/cwLogon.jsp>

Coeus Lite Demo

RUTGERS

COEUS LITE

Coeus Login

Use of this CoeusLite™ requires a username and password.

If you are a new user for CoeusLite, please ask for a username and password by clicking on "Register" below..

[Register](#)

If you already have created a login, sign in below.

USERNAME	PASSWORD
<input type="text" value="fullem2"/>	<input type="password" value="*****"/>

[Login](#) [Reset](#)

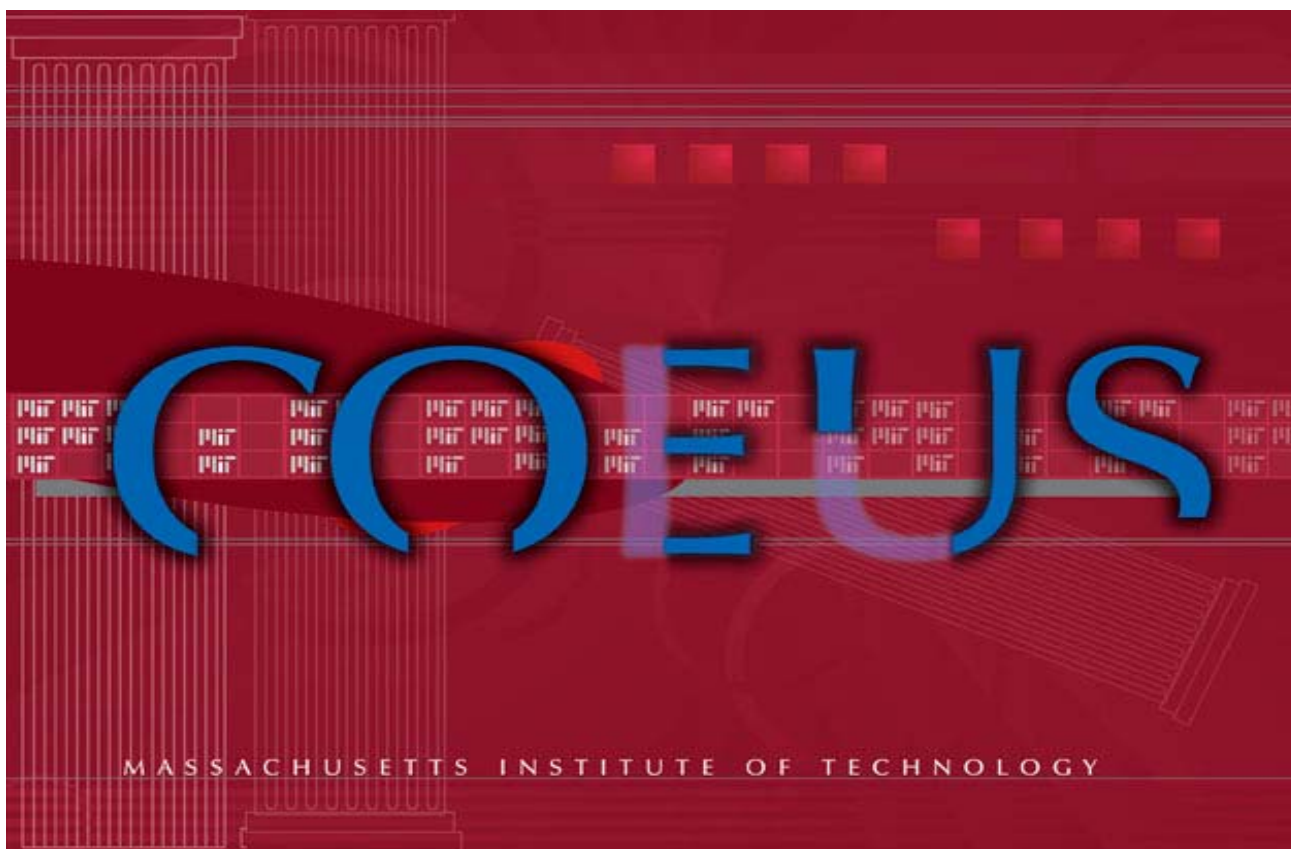
COEUS

MASSACHUSETTS INSTITUTE OF TECHNOLOGY

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Coeus Premium Demo



Coeus Demonstration

- FUNCOEUS Lite
 - <https://165.230.179.148:8443/coeus/coeuslite/mit/irb/cwLogon.jsp>
- FUNCOEUS Premium
 - <https://165.230.179.148:8443/coeus/coeus.jnlp>

Create a New Proposal (New or Copy Existing)

Select Investigator, Certify Investigator

Mark Budget Complete & Final

Upload Compliance & Budget Attachments

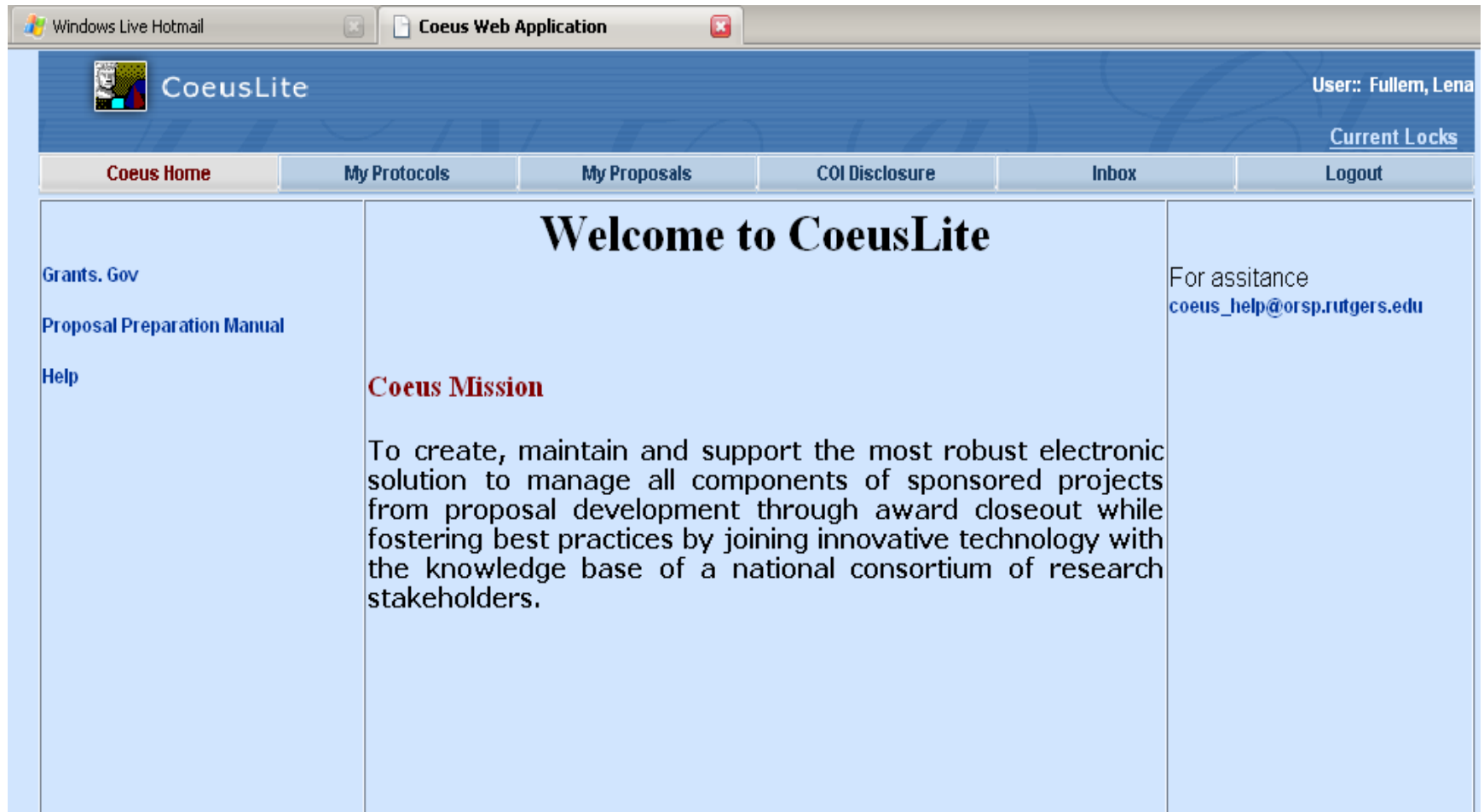
view attachments in Premium or on server

Answer Yes/No Proposal Questions

Submit for Approval

view routing in Premium

Coeus Lite Banner Screen



The screenshot shows a web browser window with two tabs: "Windows Live Hotmail" and "Coeus Web Application". The Coeus Lite application interface features a blue header with the CoeusLite logo and the user name "User:: Fullem, Lena". Below the header is a navigation menu with tabs for "Coeus Home", "My Protocols", "My Proposals", "COI Disclosure", "Inbox", and "Logout". The main content area is divided into three columns. The left column contains links for "Grants. Gov", "Proposal Preparation Manual", and "Help". The middle column displays a "Welcome to CoeusLite" message and a "Coeus Mission" statement. The right column provides contact information for assistance: "For assistance" and the email address "coeus_help@orsp.rutgers.edu".

Windows Live Hotmail | Coeus Web Application

CoeusLite User:: Fullem, Lena
[Current Locks](#)

Coeus Home | My Protocols | My Proposals | COI Disclosure | Inbox | Logout

Welcome to CoeusLite

Grants. Gov
Proposal Preparation Manual
Help

Coeus Mission

To create, maintain and support the most robust electronic solution to manage all components of sponsored projects from proposal development through award closeout while fostering best practices by joining innovative technology with the knowledge base of a national consortium of research stakeholders.

For assistance
coeus_help@orsp.rutgers.edu

Create New Proposal Screens

Windows Live Hotmail | Coeus Web Application

CoeusLite User: Fullem, Lena [Current Locks](#)

[Coeus Home](#) | [My Protocols](#) | **[My Proposals](#)** | [COI Disclosure](#) | [Inbox](#) | [Logout](#)

[All Proposals](#) | [Proposal In Progress](#) | **[Create New Proposal](#)** | [Proposal Search](#) | [Grants.gov Opportunity Search](#)

Please select Unit for a New Proposal

Unit Number	Unit Name
000001	Rutgers the State University of New Jersey
200611	NBR\ENG/Computer Engineering

Windows Live Hotmail | Coeus Web Application

CoeusLite User: Fullem, Lena [Current Locks](#)

[Coeus Home](#) | [My Protocols](#) | **[My Proposals](#)** | [COI Disclosure](#) | [Inbox](#) | [Logout](#)

[All Proposals](#) | [Proposal In Progress](#) | **[Create New Proposal](#)** | [Proposal Search](#) | [Grants.gov Opportunity Search](#)

General Info >>

Organization

Investigators/Key Persons

Budget

Special Review

Abstract

Others

Upload Attachments

Validate

Submit for Approval

S2S

Print

Copy Proposal

General Proposal Information

* Indicates Mandatory Fields

Proposal Details

*Proposal Type:

*Activity Type:

If Continuation WBS #:

Award #: [Search](#)

*Start Date:

*End Date:

Agency/Sponsor: [Search](#)

Prime Sponsor: [Search](#)

Proposal Deadline Date:

Receipt PostMarked

Sponsor Proposal No :

What do you think?

- How can we make it better?
- How can we make it easier to use?
- How can we ease the transition?
- What would you like to see as far as
 - Training
 - Website
 - Documentation