

Version 4.1.1

Gift Awards Guide

Rutgers The State University of New Jersey

ORSP
Office of Research & Sponsored Programs



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1.1 Rutgers Foundation Awards Overview

The Coeus Award Module maintains detailed information on all award types including a complete history of every change made to an award from notice through closeout. The Coeus system stores all agency contacts (in the electronic rolodex), maintains all reporting requirements (financial, technical, property, patents), maintains the terms and conditions, required cost sharing, special reviews (animals, human subjects, biohazards, etc.), and F&A rates.

For the purpose of tracking gift award types, the RU Foundation will be data entering the minimal amount of data needed to save a Coeus Award entry. The gift award data entered by the foundation will consist of the following fields:

Award Detail Tab

Select Status
 Enter Begin Date (today)
 Select Sponsor
 Select Activity Type
 Select Award Type
 Select Account Type
 Enter Title

Other Header Tab

Select Template

Money &End Dates Tab

Enter Obligated Amount
 Enter Anticipated Amount
 Enter Final Expiration Date (+ 1 year)










Investigator Tab

Select PI
 Checkbox Lead PI
 Select Lead Unit
 Checkbox Lead Unit

Other Tab

Enter Total Direct Cost
 Enter Total F&A Cost (always zero)

1.2 RU Foundation Award Navigation / Toolbars and Searchable Columns

Icon	Action	Icon	Action
	Navigate to the Award Module		Create New Award
	Correct an Award mistake		Sort the Award entries in the displayed list
	Display Existing Award in view-only mode		Award summary
	Save changes or Save data		Search for an Award entry
	Close the Award window		

Coeus Gift Awards Module Search Columns

Award Number
Sponsor Award Number
Lead Unit
Lead Unit Name
Account Number
Status
Title
Sponsor Code
Sponsor Name
Principal Investigator
OSP Administrator
Obligated Amount
Anticipated Amount
Obligated Distributed Amount
Anticipated Distributed Amount
Award Effective Date
Obligation Expiration Date
Final Expiration Date

1.3 Creating a New Gift Award


The Award module in Coeus contains various pieces of information that relate to any given award. Only the key pieces of information required to save a gift award in Coeus will be data entered for those awards related to gifts processed through the Rutgers Foundation.

The following is a sample of a simplified work flow of how information should be entered for a RU Foundation Gift Award:

Award Detail	Other Header	Money and End Dates	Contacts	Reports	Terms	Special Review	Investigator	Comments	Subcontracts	Other
--------------	--------------	---------------------	----------	---------	-------	----------------	--------------	----------	--------------	-------

Begin with the Award Details Tab and then move through each of the other 5 tabs required for **Gift Award** Coeus data entry.

Opening the Coeus Award Module

To open the Award module you can click on the **Maintain Awards**  icon or select **Maintain > Awards** from the menu bar to display the Award List window. The Award Search window is displayed layered upon the Awards List screen.

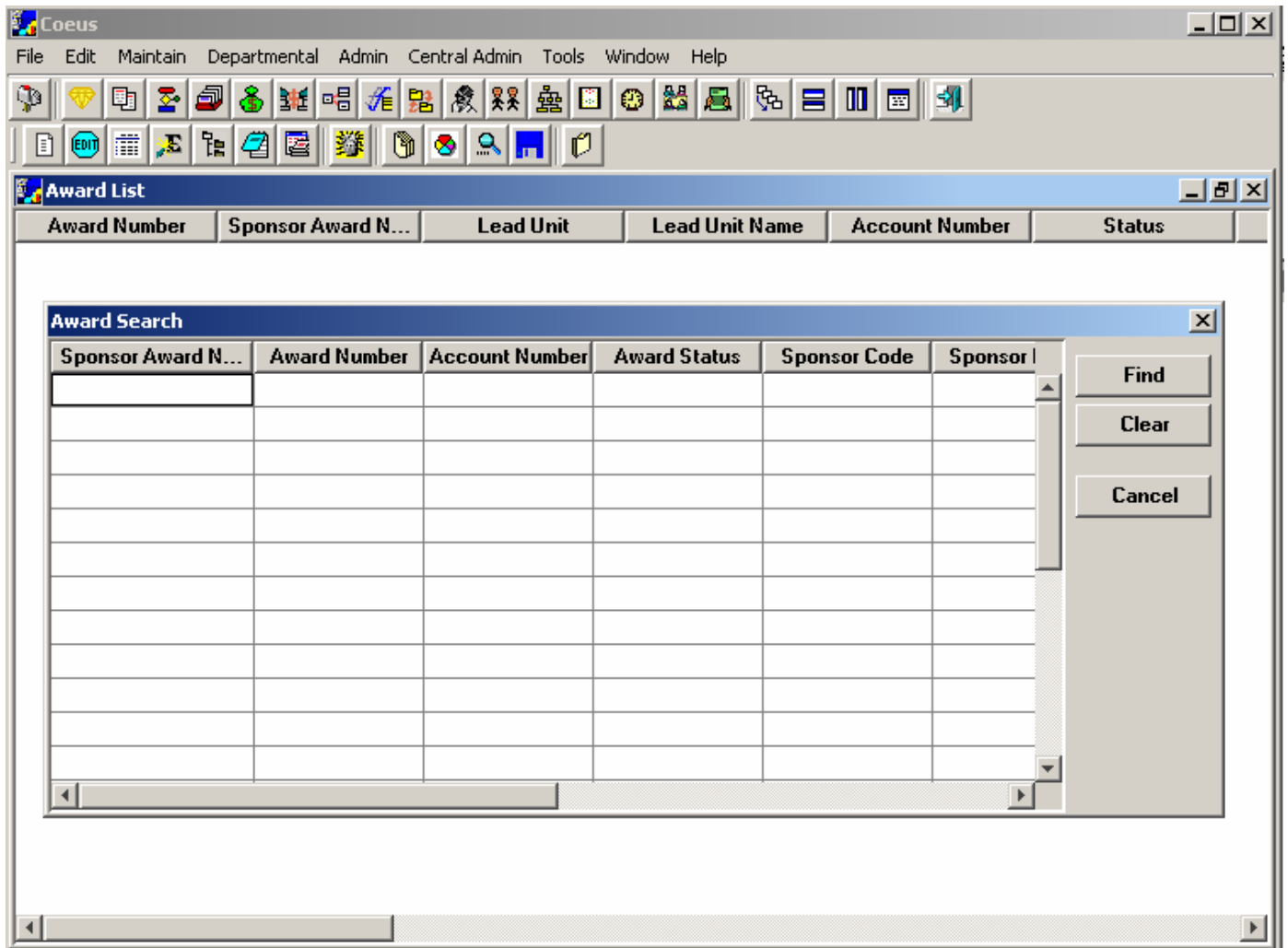



Figure 1.1: Initial Award List window with Search window

Coeus Hint!

When you open any module in Coeus, the Search Window will appear as the active window above the main window.

To get to the main window click on the  button of the Search Box or click on the

Cancel

button within the Search Box window.

Creating a New Gift Award

To create a new Award you can click on the **Create New Award**  icon or select **Edit > New Award** from the Menu bar.

Cancelling the Proposal/Award Link

Gift awards entered by the RU Foundation do not need to be linked to active institute proposals. To cancel the proposal to award link, click on the **[Cancel]** button after the Select Proposal window opens.

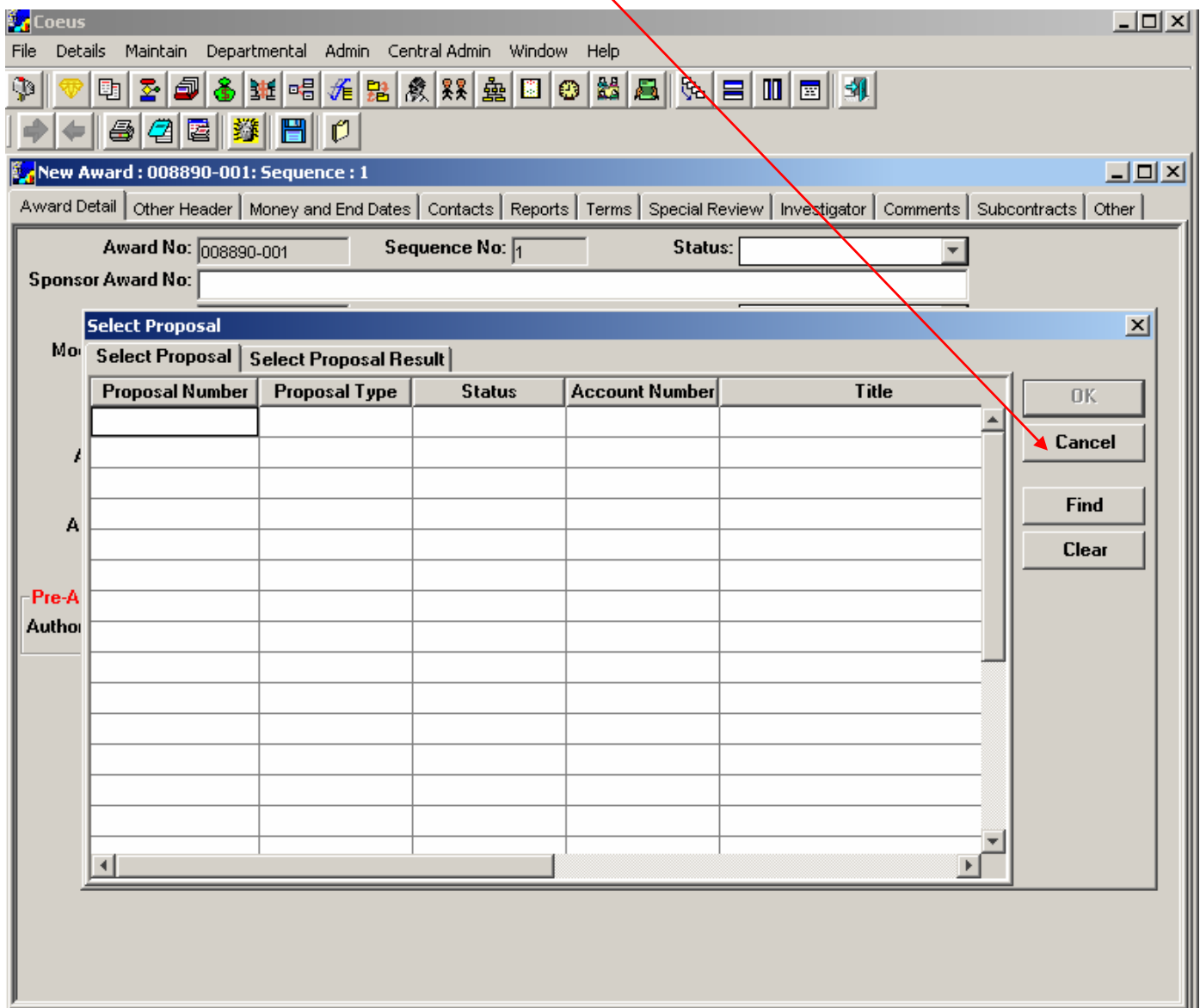


Figure 1.2: Select Proposal window on top of New Award window

■ Entering Award Details in each of the 5 Gift Related Award Entry Tabs

There are 5 tabs that contain fields which need to be populated when creating a new Gift Award. Some of the fields in the related tabs which do not need to be data entered for gift awards but are required by Coeus will be pre-filled based on the Award Template selection on the Other Header tab. This section will walk you through each pertinent Gift Award tab and it's corresponding fields.

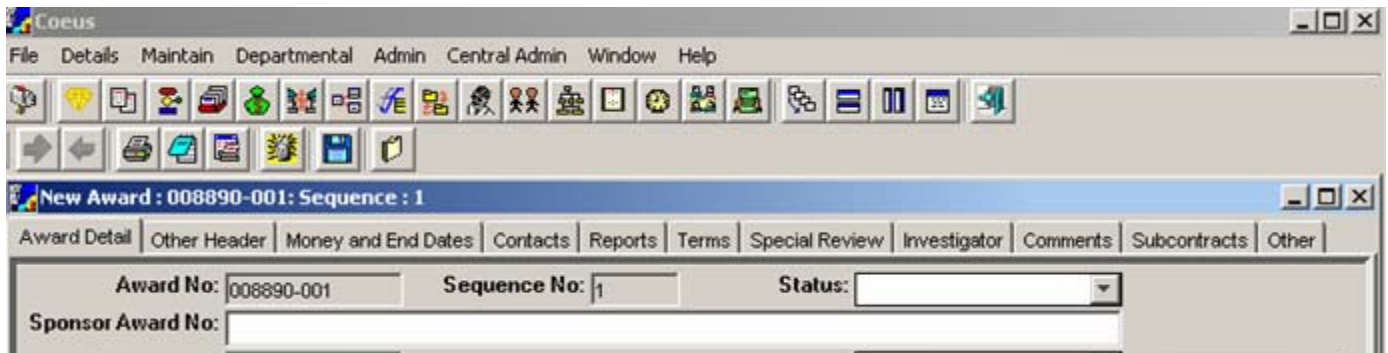


Figure 1.3: Tabs of the Award module

☺ *Coeus Hint!*

*It is always a good idea to save
your work, every so often by
clicking the  button*

Or

*By selecting the File > Save
option from the Coeus Toolbar.*

1. Award Detail Tab -This tab contains basic information about the gift award.

Figure 1.4 Award Detail tab


The table below is a field by field guide for entering gift award data into the **Award Detail Tab**.

Coeus Hint!
 Fields with an arrow ↓ after them denote that they part of a drop down list box selection.
 Fields with a search box after them denote that they part of search window selection.

Award No. Assigned by Coeus (all Parent Awards will end with the 001 suffix).	Sequence No. Assigned by Coeus (Defaults to 001 when entering a new award).	Status ↓ Select the “Active” award status from the list of values.
Begin Date		
Enter Today's Date		
Sponsor		
Choose the appropriate sponsor from the search selection window. See the Selecting a Sponsor section below.		

Activity Type ↓	
Select “Other” for the Activity type by clicking on the correct value from the drop-down menu.	
Award Type ↓	Account Type ↓
Select the “Gift” Award type by clicking on the correct value from the drop-down menu.	Select the “Gift” Account Type from the list of values in the drop down menu.
Title	
Enter “RU Gift” in the Award Title field	
Last Update	Update User
– Generated by Coeus	– Generated by Coeus

■ Selecting a Sponsor

To select the appropriate Sponsor for a new gift award click on the **Search**  icon next to the *Sponsor* field and conduct a search for your Sponsor in the search window.

Searching for the Appropriate Sponsor

Sponsor Name
PEW*

Use the * (asterisk) wildcard character to search on all or part of the Sponsor Name. Sponsor Name is **not** a case sensitive field.

Sponsor Name
* Inc.

You can combine use a space as part of your search criteria.

Sponsor Name ▲
4Cs Breeding Technologies, Inc.
A.L. Mailman Family Foundation, Inc.
A. Strauss-Weider, Inc.
Abt Associates, Inc.
Acacia Bioscience, Inc.
Acta Metallurgica, Inc.
Adamar of New Jersey, Inc.
ADMS Inc.

Any search result column can be sorted by clicking on the column title.

Sponsor Type	Sponsor Type
Foundation ▼	Private Profit ▼

Search for sponsors based on differing Sponsor Types.

- 2. Other Header Tab** -This tab contains miscellaneous sponsor, proposal, and payment information about the award. Select the RU Foundation Gift Template. This will pre-fill in many of the required data fields in the other tabs.

Correct Award : 009127-001: Sequence : 1

Award Detail Other Header Money and End Dates Contacts Reports Terms Special Review Investigator Comments Subcontracts Other

Template: RU Foundation Gift Template

Prime Sponsor: Johnson & Johnson, Inc.

Proposal Due for

Non Competing Continuation:

Competing Renewal:

Payment

Basis: Gift

Method: Gift

Payment / Invoice Frequency: As required

Invoice Number of Copies: Final Invoice Due within: Days.

Invoice Instructions:

Figure 1.6: The Other Header tab

Template ↓

Templates are a pre-programmed set of values and contain standard terms and conditions for a particular sponsor. Select the RU Foundation Gift template from the drop down list of values.

The **Basis, Method** and **Payment/Invoice Frequency** fields will be automatically populated once you have selected a Default Template.

3. Money and End Dates Tab -This tab stores date and dollar amount information related to an RU Foundation gift award.

Total Amounts		Dates			
	Obligated	Anticipated	Oblig. eff	Oblig. exp	Final exp
[1] 009127-001	\$1,000.00	\$1,000.00			01-Jul-2008

Figure 1.7: Money and End Dates Tab

The fields that need to be filled out are under the categories of **Amount Change** and **Dates**.

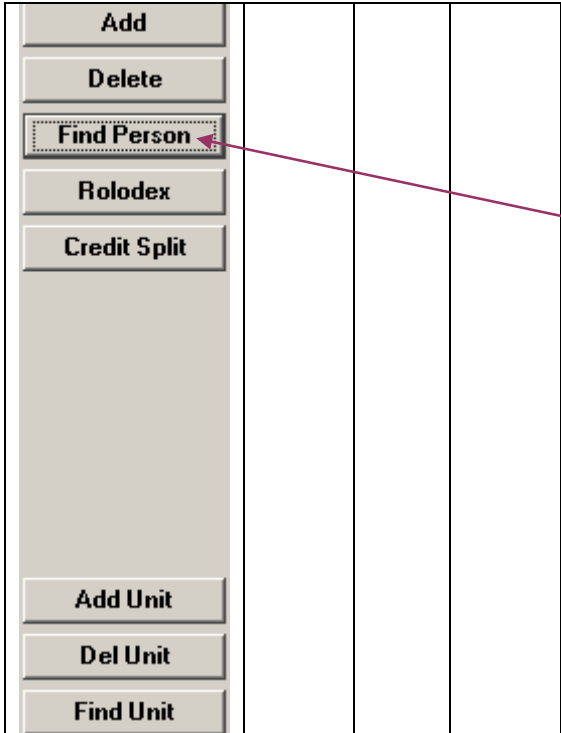
Amount Change (you do not need to enter commas)		Dates (all dates should be entered as MM/DD/YY)
Obligated Enter the total amount of the gift.	Anticipated Re-Enter the total amount of the gift.	Final exp Enter Today's Date Plus One Year For Example: If entering 7/1/2007 in the Begin Date field Enter 7/1/2008 in the Final Exp Date field

4. Investigator Tab -This tab contains information pertaining to the Principal Investigator(s) associated with a gift award. If there is no specific PI associated with the gift, select the department chair of the department receiving the gift award.

Person Name	%Effort	PI	Faculty	
Fuller, Mrs. Lena	.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Add Delete Find Person Rolodex Credit Split

Lead	Number	Name	Osp Administrator	
<input checked="" type="checkbox"/>	000001	Rutgers the State University of New Jersey		Add Unit Del Unit Find Unit Administrators

Figure 1.8 Investigator Tab



Adding an Investigator

- To add an Investigator from within Rutgers University, click on the **[Find Person]** button and search for the person in the Person Search window. Once you find the intended person, click the **[OK]** button and the selected person will populate the field.

Figure 1.9 Investigator Tab buttons

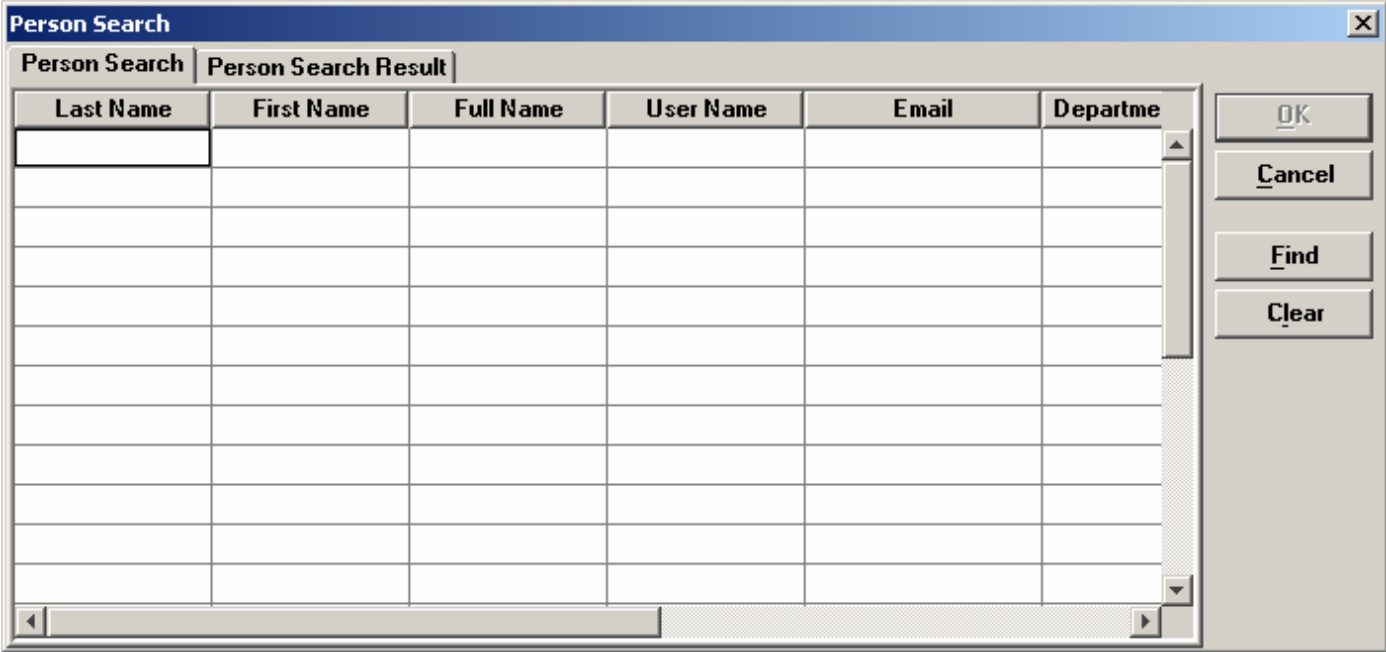


Figure 1.10 Person Search Window in the Investigator Tab

<p>Add Unit</p> <p>Del Unit</p> <p>Find Unit</p> <p>Administrators</p>	<p>Adding a Unit</p> <ul style="list-style-type: none"> To add the university Unit associated with the gift award, click on the [Find Unit] button and enter the search criteria in the Unit Search window. Once the correct unit is displayed in the Unit Search Result window, click the [OK] button and information will auto-populate the field.
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Figure 1.11 Unit Tab buttons

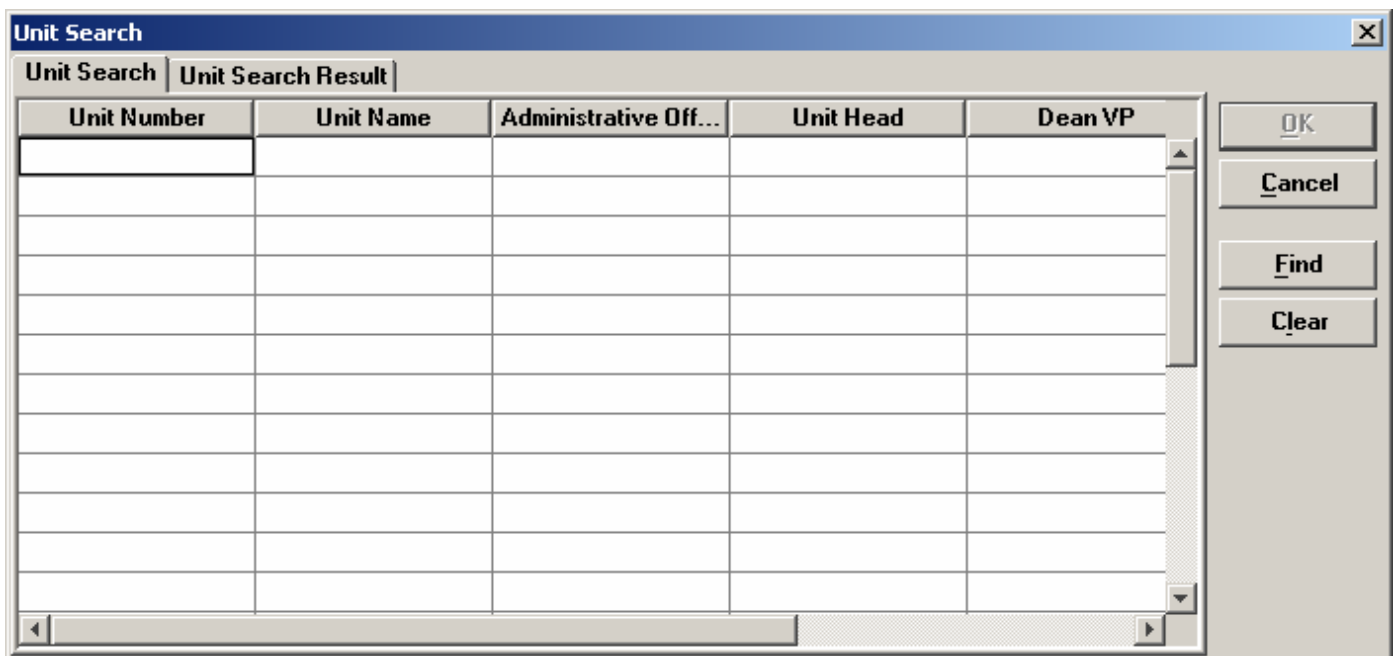



Figure 1.12 Unit Search Window in the Investigator Tab

5. Other Tab -This tab contains custom fields' specific to Rutgers University. There are two required fields on this tab, which must be data entered for Coeus to save the gift award. You must enter the gift award amount in the **Total Direct Costs** field. And you must enter **"0"** in the **Total F&A Costs** field.

Award Detail	Other Header	Money and End Dates	Contacts	Reports	Terms	Special Review	Investigator	Comments	Subcontracts	Other
4-2 Acct List										
ORSPLOG Abstract ID:										
Total Direct Costs		1000								
Total F&A Costs:		0								
Transmit Date										


Figure 1.13: Other tab

Now that you have completed entering the required information into the 5 tabs associated with Coeus gift award entry, you can save the award either by clicking on the save icon  or by using the **File/Save** Menu option.

■ 1.4 Viewing Awards

Coeus has several different ways to view your award information.

Display Award Summary

When you bring up a list of awards in the Award List window you can select which award you want a summary of and then click the **Award Summary**  icon to get summary information.



Award Summary [X]

Spon Award No.: 12345
Activity Type: Organized Research
Award Type: Contract
Account Type: Regular
Title: TEST - correct award

Award No.: 008042-001
Account No.: 212345

Sponsor: 001010 : DHHS-NIH-NCI-DBS-LMB (DO NOT USE)

Award Eff Date: 01-Jul-2006
Final Exp Date: 30-Jun-2008

Obligation Eff Date: 01-Jul-2006
Obligation Exp Date: 30-Jun-2007

Anticipated Amount: \$1.00
Obligated Amount: \$0.30

Apprvd Equipment **Payment Schedule** **Indirect Cost**
Apprvd Subcontract **Transfer Sponsor** **Status:** Active
Apprvd Foreign Trip **Cost Sharing**

Investigators
 DELGADO,JOSEPH

Units
 2-00150 : NBRWResearch and Sponsored Programs, Offic...

Close
 Prev
 Next

Figure 1.14 Award Summary window

1.5 Printing Awards

You can print an gift award notice directly from Coeus. Bring up the gift award you wish to print in either view or edit mode, click on the **File → Print Award** Notice option. Click on the **[Deselect All]** button (these print options are not associated with gift awards). Click on the **[Print]** button, and Coeus will format a PDF file containing the Award Notice.

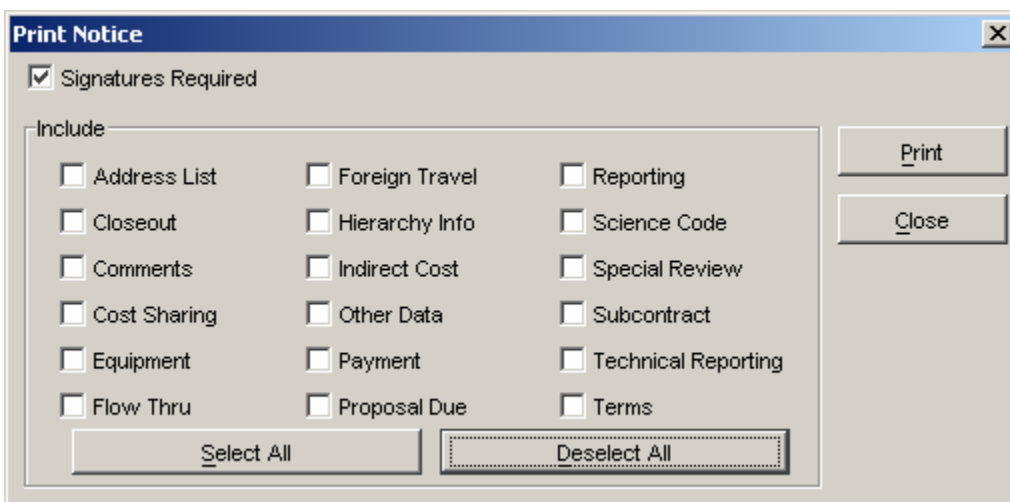


Figure 1.15: Print Award Notice window

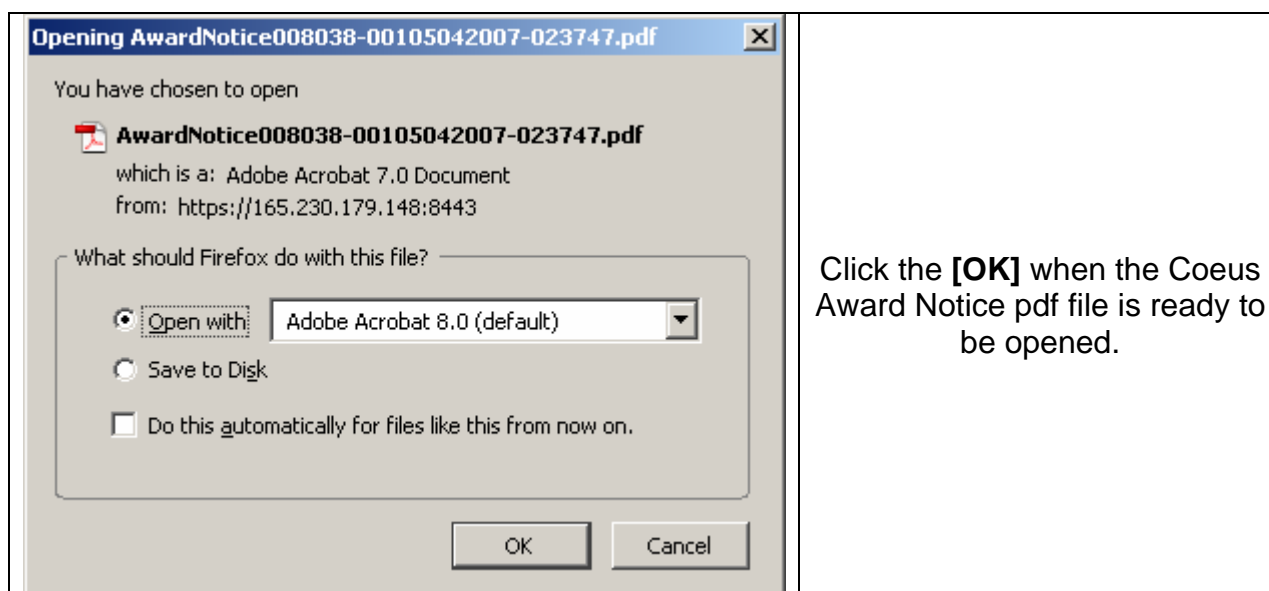


Figure 1.16: Open Award Notice window

Save the data you have downloaded from Coeus to the location and with the file type that you prefer to create and edit the report.

Most often, it is easiest to work with an Excel spreadsheet file when creating ad-hoc reports.

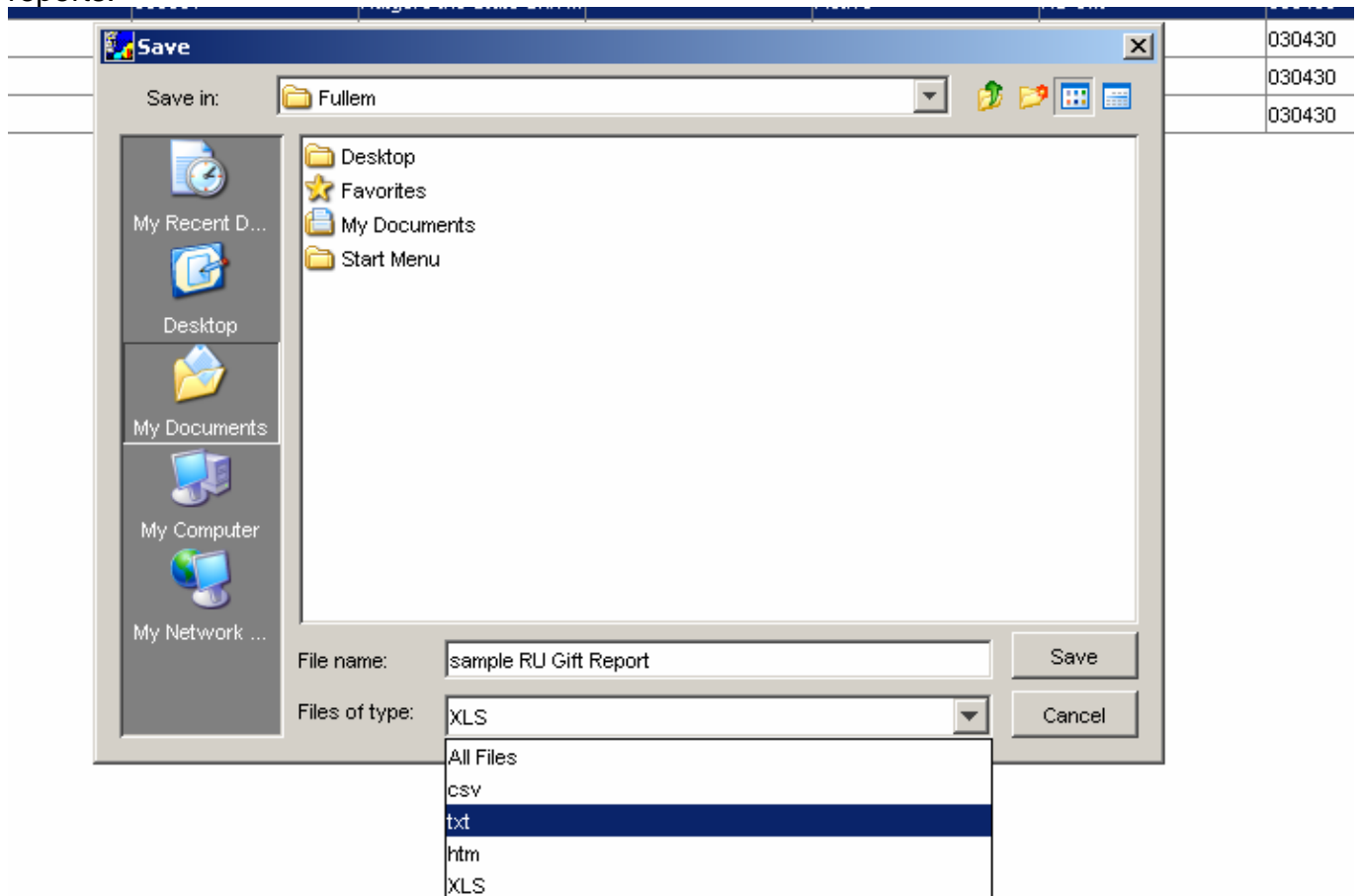


Figure 1.19 SaveAs File Types

Below is a sample of the type of ad-hoc reports that can be created using data downloaded from Coeus and manipulated in Excel.

RUTGERS Gift Awards by Sponsor Report

<u>Award Number</u>	<u>Lead Unit</u>	<u>Lead Unit Name</u>	<u>Title</u>	<u>Sponsor Name</u>
009127-001	000001	Rutgers the State University of New Jersey	RU Gift	Johnson & Johnson, Inc.
009128-001	000001	Rutgers the State University of New Jersey	RU Gift	Johnson & Johnson, Inc.
009129-001	000001	Rutgers the State University of New Jersey	RU Gift	Johnson & Johnson, Inc.
009130-001	000001	Rutgers the State University of New Jersey	RU Gift	Johnson & Johnson, Inc.
				Total Johnson & Johnson Gift Awards

Figure 1.20 Sample Gift Award Report