

UMB Coeus Users Group

November 14, 2007



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Today's Agenda

- New form for participating department sign-off/DRIF/cost-sharing
- Proposed on-going training opportunities for current Coeus Users
- Roles and mapping - the basics
- Lessons learned and other updates

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Proposed new form

- **Cost Sharing Approval Request and Memo of Understanding for Collaborative Routings**
 - Concept: Collect all necessary signatures from participating/collaborating units at the same time
 - Sign-off for collaborating investigator/staff effort and budget (including over-salary-cap approval)
 - DRIF allocation agreement between lead unit and collaborating unit(s)
 - Approval for other mandatory cost share by lead unit and/or collaborating unit(s)
 - Upload the completed, signed form as a single document as a Narrative Attachment (required prior to ORD sign-off)

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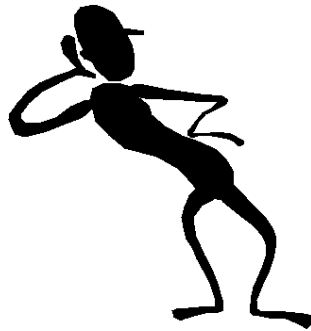
Comments/suggestions received

1. Divide into two forms (Personnel commitments and DRIF; separate form for cost sharing approval)
2. Design so that the form can be sent out to individual units instead of trying to collect all signatures for all units on one form
3. Omit lead unit signatures from form

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Your turn

Any other comments or suggestions about this proposed form?



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Comments received from meeting attendees:

- Make the form more concise by pulling out the instructions to a separate page that would not need to be scanned/uploaded
- Should collaborating investigators sign?
- Offer a choice: Add collaborating department chairs as Approvers in Coeus (would still need to attach DRIF allocation spreadsheet), **OR** complete form and have it signed
- Are Chairs required to sign for collaborating departments and/or DRIF?

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Form Follow-up

- Comments and suggestions will be discussed and form(s) revised. Information and revised form(s) will be distributed via the Users Group email and posted to the Coeus website.

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Current Users and Ongoing Support

- Sorry...no “sandbox” for now
- Special topic sessions
 - Follow-up to initial training and refresher “On-Demand” modules
 - Classroom-style training sessions on specific topics
 - Hands-on sessions? Or presentation/discussion like “RAC Mentoring”?
 - Topic ideas?

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Discussion about on-going training

- Further clarification - the idea is to have sessions on very specific topics such as “modular budget creation”
- Couldn't a test/fake proposal be entered in Production with a title like “TEST - DO NOT USE”? --Dean's Offices and ORD (in particular) have concerns about reviewing or even submitting a “test” proposal.
- Suggestion for e-mail updates of changes, shortcuts, issues and resolution. This person does not want to attend meetings if the only purpose is to provide information that could be emailed out to Users.

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Roles and mapping

- Coeus Roles
 - <http://www.umaryland.edu/coeus/roles.html>
 - Proposal Creator
 - Aggregator
 - Budget Creator
 - Approver
- Mapping for internal approvals
 - In your unit, who needs to see the proposal on its way to the Dean's Office?
 - Alternate approvers

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Lessons learned

- Too many Coeus System emails
 - Suggestion: only Administrator (and an alternate) receives System emails, then notifies other approvers as needed
 - Requires the Administrator to be on the Approval map for that Unit
 - Other suggestions are welcome!
 - This issue has been forwarded to the Consortium but we do not know if a “fix” will be included in a future release or when that would be

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Lessons learned (continued)

- Grants.gov forms in Coeus - the NIH forms are OK; we haven't fully tested the others
- Any new issues? What have we missed?
 - One User had a problem with the grant number (Sponsor Proposal No.) changing when the proposal is copied. We will test to see if we can duplicate this problem and find out how to prevent it.
 - Comment about possible errors due to “copy and paste” (example - copy & paste grant title from a Word document into the Coeus field) - for Grants.gov proposals, there are sometimes hidden characters or spaces that cause validation errors.
 - Ability of Aggregator to add Narrative Attachments when the proposal has been submitted for approval - this problem is being tested - a potential solution led to another problem. We will keep you posted.

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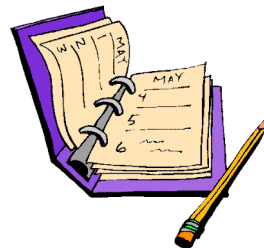
Coeus updates and issue resolution

- Department debriefs continue, following each major deadline
- New issues/resolutions - check here:
<http://www.umaryland.edu/coeus/latestinfo.html>

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UMB Coeus User Group Upcoming meeting dates

- Mark your calendar!
December 11 - 1:00 PM
At HSF II Auditorium
- Watch for a message
about 2008 dates



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