





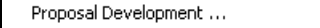





Coeus





Proposal Budget Training







Logging into Coeus



1.	<p>Enter your EmplID in the myUMBID: field.</p> <p>For this exercise, enter "004550" into the myUMBID field</p>
2.	<p>For this exercise please enter "coeus" in the Password: field</p>
3.	<p>Click the Sign In button.</p> 
4.	<p>Once you log into the Campus Portal, you will notice the Enterprise Menu on he left listing applications available for your use.</p> <p>To launch the Coeus application, Click the Coeus link</p> 
5.	<p>The first time you launch Coeus at your workstation, the server will install all of the necessary components to run the application.</p> <p>There are a few requirements that need to be met prior to running Coeus for the first time:</p> <ul style="list-style-type: none"> * You will need Java Runtime installed on the workstation. * You will need Adobe Acrobat creator (not the free viewer) installed for Coeus to populate the forms to submit to Grants.gov.
6.	<p>Coeus Requires its own login combination and a login box appears.</p> <p>In the User Name : field. Enter the User Name "004550".</p>
7.	<p>In the Password : field. Enter "coeus".</p>
8.	<p>Click the OK button.</p> 
9.	<p>The Coeus welcome screen displays.</p>
10.	<p>You have now logged in to Coeus via the UMB campus portal.</p> <p>End of Procedure.</p>

Begin Creating the Proposal Budget


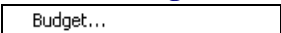

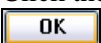

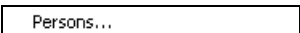
1.	<p>Begin by navigating to the Proposal for which you would like to prepare an initial budget.</p> <p>Click the Maintain menu.</p> 
2.	<p>Click the Proposal Development ... menu.</p> 
3.	<p>The easiest way to search for a proposal is by Proposal Number.</p> <p>Click in the Proposal Number field.</p> 
4.	<p>For this exercise, you will be working with proposal number 00000699. You will use the wildcard * to aid in your search.</p> <p>Enter "*699" into the Proposal Number field.</p>
5.	<p>Click the Find button.</p> 
6.	<p>The correct proposal is displayed and selected. To modify the proposal</p> <p>Click the Modify selected Proposal button.</p> 
7.	<p>The proposal is displayed in the initial view called the Proposal Details.</p> <p>To begin the initial budget, you must first navigate to the Proposal Budget window.</p>
8.	<p>To begin navigating to the Budget window</p> <p>Click the Edit menu.</p> 
9.	<p>Click the Budget... menu.</p> 
10.	<p>The Select Budget window appears.</p> <p>This proposal does not yet contain a budget, so there are no budgets displayed. However, after your initial budget is created, you will visit this window to display, modify, copy and finalize your budget.</p>


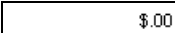



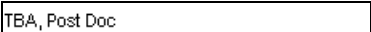

11.	<p>To create a new budget</p> <p>Click the New button.</p> 
12.	<p>The Total Cost limit and the Total Direct Cost limit field are optional fields. If you choose to enter a value in this field, Coeus will issue a warning when you save your budget if you have exceeded this amount.</p> <p>The Total Cost limit features do <i>not</i> warn you while you are creating your budget, only when you save your budget. Additionally, this feature will not stop you from submitting a proposal that has exceeded this limit.</p>
13.	<p>For this exercise, set the Total Direct Cost Limit to \$1,000,000.</p> <p>Click in the Total Direct Cost Limit: field.</p> 
14.	<p>Enter "100000" into the Total Direct Cost Limit: field.</p>
15.	<p>The OH Rate Type field describes the overhead rate type for the proposal. This rate is automatically selected based upon the Activity Type chosen in the Proposal Details when creating the initial proposal.</p> <p>Verify that the rate type selected is correct, and make any necessary correction if it is not.</p>
16.	<p>If you change the OH Rate Type in the budget (or if you change the Activity Type in the Proposal Details) you will get a message saying that you should recalculate the budget since the new rate type will change the Indirect Costs for the budget. Choose "Yes" to re-calculate the budget when prompted.</p>
17.	<p>Comments are notations viewable only by the user in Coeus. It is helpful to make notations regarding the budget to differentiate one budget from another within the proposal.</p> <p>Click in the Comments: field.</p>
18.	<p>Enter "Initial budget with trainer and PostDoc" into the Comments: field.</p>
19.	<p>Next, you need to view the Institute Indirect and Inflation rates, making any necessary changes. To begin,</p> <p>Click the Edit menu.</p> 
20.	<p>Click the Rates... menu.</p> 
21.	<p>The <i>Modify Rates</i> window appears.</p> <p>To be sure you are using the most up-to-date indirect and inflation rates for your proposal you should synchronize (sync) your proposal rate table to the institute rate table. If you started a new proposal, the rates should be accurate. However, if you have copied a proposal it is <i>imperative</i> that you synchronize the proposal to the current rates.</p>




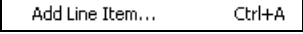



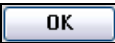

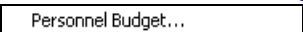
22.	<p>It is recommended that you synchronize your proposal to the institute rates <i>before</i> making any manual adjustments to the rates.</p> <p><i>Clicking the Sync button resets all adjusted rates back to the Institute's current rates.</i></p>
23.	<p>The window shows two different rates: The Institute Rate and The Applicable Rate.</p> <p>If you would like your Indirect Costs or Inflation rate to <i>differ</i> from the Institute Rate, you can modify the value in the Applicable Rate field.</p> <p>The rates are divided into four categories - MTDC (Modified Total Direct Costs), Employee Benefits, Inflation and Other.</p>
24.	<p>For this exercise, you will be changing the Inflation rate for your proposal from 3% to 4%.</p> <p>Click the Down button of the scrollbar.</p> 
25.	<p>To change a rate, click in a rate field and edit its value.</p> <p>Click in the 3.00 field.</p> 
26.	<p>Change the information from 3.00 to 4.00.</p> <p>Enter "4".</p>
27.	<p>Continue changing each applicable rate as necessary. When you are satisfied with the rates you have entered</p> <p>Click the OK button.</p> 
28.	<p>You should recalculate the budget to reflect the new rates.</p> <p>Click the Yes button.</p> 
29.	<p>You can save your budget at any time, allowing you to work on your budget at different times during the proposal aggregation process.</p> <p>Click the Save button.</p> 
30.	<p>When you are finished working on your budget (for the time being),</p> <p>Click the Close button.</p> 
31.	<p>After closing the budget window, you are back at the Proposal Details window.</p>




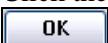
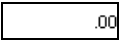

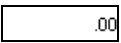
32.	<p>If you would like to open the Budget module again, you can access the budget via the Edit menu or</p> <p>Click the Proposal Budget button.</p> 
33.	<p>The budget you created previously is listed in the <i>Budget</i> window. To continue working on your budget</p> <p>Click the Modify button.</p> 
34.	<p>You have now logged in to Coeus, created a new proposal, and populated the Proposal Details panels.</p> <p>End of Procedure.</p>





Adding Personnel Line Items

1.	<p>Adding Personnel Line Items to your budget is a two-part process.</p> <ul style="list-style-type: none"> • First, you must create/edit the Budget Persons list for your proposal • Once your personnel are added to the budget personnel "shopping list" you can add these individuals to various personnel cost elements.
2.	<p>In this exercise, you are navigating to a budget previously created for this proposal.</p> <p>Click the Edit menu.</p> 
3.	<p>Click the Budget... menu.</p> 
4.	<p>To modify the existing budget</p> <p>Click the Modify button.</p> 
5.	<p>If your proposal lists non-UMB employees as Key Persons or Investigators, such as those individuals selected from the Rolodex, you will be prompted to choose an Appointment Type for those individuals when you select a budget to work with.</p> <p>Appointment Type is not a criteria that is being tracked at UMB, so leave the default, REG EMPLOYEE set for these individuals.</p>
6.	<p>Click the OK button.</p> 
7.	<p>First, complete the proposal personnel, "shopping list."</p> <p>This proposal budget will not only include the Investigators and Key Persons but any unnamed personnel that will be hired, should the proposal be funded.</p>
8.	<p>Click the Edit menu.</p> 
9.	<p>Click the Persons... menu.</p> 
10.	<p>The <i>Budget Persons</i> window appears.</p> <p>The people listed in the Budget Person window are the Investigators and Key Persons carried over from the Proposal Details module of your proposal.</p>



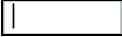



11.	<p>Each of the fields within the Budget Persons window are able to be edited.</p> <p>While the eUMB HRMS system supplies a great deal of information into Coeus, Faculty and staff base salaries are <i>not</i> among these items (as requested by the UMB community.)</p> <p>You need to supply the correct base salary(ies) in the Calc Base field.</p>
12.	<p>To enter Dr. Kingsbury's base salary</p> <p>Click in the Calc Base field.</p> 
13.	<p>Enter "10000" into the Calc Base field.</p>
14.	<p>Perform the same procedure for the remaining Budget persons.</p> <p>Click in the Calc Base field for Dr. Krueger.</p> 
15.	<p>Enter "80000" into the Calc Base field.</p>
16.	<p>Click in the Calc Base field for Mr. Smith.</p> 
17.	<p>Enter "60000" into the Calc Base field.</p>
18.	<p>This is the time and place to enter any un-named personnel whose salary you would like to have funded, should the proposal be awarded.</p>
19.	<p>Coeus has been pre-loaded with a variety of <i>To Be Announced</i> people such as Budget Analysts, Technicians and PostDocs.</p> <p>For this exercise, we will be adding a Post Doc to our budget from the TBA search table.</p>
20.	<p>Click the Add TBA button.</p> 
21.	<p>The various <i>TBA</i> persons are listed in no particular order.</p> <p>Click the Down button of the scrollbar.</p> 
22.	<p>Click the TBA, Post Doc list item.</p> 
23.	<p>Click the OK button.</p> 
24.	<p>You will notice there are multiple entries in the database for each title (TBA Post-doc 1, TBA Post-doc 2, etc.)</p> <p>Coeus <i>requires</i> that each person in the budget be unique. For example, if you are adding two Postdocs with two different salaries to your budget, you will need to select two different person records to your Budget person "shopping list."</p>
25.	<p>For each TBA budget person, you will need to enter a base salary in the Calc Base field.</p>







26.	Enter " 24500 " as the base salary into the Calc Base field.
27.	Once your list of Budget Persons is complete Click the OK button. 
28.	Part one is now complete. Next, add the Budget Persons to Personnel Line Items (Cost Elements) in the Period 1 budget.
29.	To begin adding budget line items to the Period 1 Budget Click the Period 1 tab. 
30.	Add a Budget Line Item to your budget. Click the Items menu. 
31.	Click the Add Line Item... menu. 
32.	Next, choose a Cost Element for your Budget Line Item. Click the Items menu. 
33.	Click the Select Cost Element... menu. 
34.	Begin by adding your Senior Personnel. All of the Cost Elements within the Cost Elements window are listed alphabetically. Click the Down button of the scrollbar. 
35.	Click the Senior Personnel Salary cell.
36.	Click the OK button. 
37.	Now that you have chosen a Personnel Line Item, add the appropriate personnel to the line item. Click the Items menu. 
38.	Click the Personnel Budget... menu. 

39.	<p>The personnel Budget Details window is where you choose which personnel will fall under this designation.</p> <p>Click the Add button.</p> 
40.	<p>Choose any personnel that fit the Senior Personnel description.</p> <p>You can select multiple people at once by holding the Ctrl key as you select each person.</p> <p>Press the [Ctrl] key and click the Kingsbury,Tami cell.</p> 
41.	<p>Press the [Ctrl] key and click the Krueger,Bruce Karl cell.</p> 
42.	<p>Click the OK button.</p> 
43.	<p>Both Dr. Kingsbury and Dr. Krueger are added to the Senior Personnel Salary designation.</p> <p>Within this window is where you will also designate the effort put forth toward this project by the selected personnel.</p>
44.	<p>The % Effort designated here <i>should</i> be the same as the % effort designated in the Proposal Details.</p> <p>The purpose for entering this data again (along with the corresponding % Charged) is to determine Cost Sharing, if applicable.</p> <p>To learn more about Cost Sharing, please visit the topic Entering Cost Sharing.</p>
45.	<p>Click in the % Charged field for Dr. Kingsbury.</p> 
46.	<p>Enter "10" into the % Charged field.</p>
47.	<p>Click in the % Effort field for Dr. Kingsbury.</p> 
48.	<p>Enter "10" into the % Effort field.</p>
49.	<p>Repeat for the remaining Budget Persons.</p> <p>Click in the % Charged field for Dr. Krueger.</p> 
50.	<p>Enter "5" into the % Charged field.</p>
51.	<p>Enter "5" into the % Effort field.</p>






52.	<p>Coeus calculates the Modified Total Direct Costs (the rate determined by the proposal type for this proposal) and Fringe Benefits for each person listed. To view the total calculated costs for each person in the window,</p> <p>Click the Calculate button.</p> 
53.	The Fringe Benefits and Modified Total Direct Costs are calculated.
54.	<p>Click the OK button.</p> 
55.	<p>The Description field is optional and able to be edited.</p> <p>Enter "PI and Co-PI" into the Description field.</p>
56.	Continue entering other Personnel Line Items (and their budget persons) in the same fashion.
57.	<p>To return to the Budget Summary</p> <p>Click the Summary tab.</p> 
58.	<p>This is an excellent time to save your budget.</p> <p>Click the Save button.</p> 
59.	<p>In this topic you have learned to add Personnel Line Items (Cost Elements) to your proposal budget.</p> <p>End of Procedure.</p>





Adding Non-personnel Line Items

1.	<p>Non-personnel line items are those items within your budget that do not pay out salaries or benefits to people working on the project.</p> <p>Such items include travel costs, supplies (such as consumables and reagents), equipment, subcontracts and other operating expenses.</p>
2.	<p>The steps involved in adding non-personnel line items are:</p> <ul style="list-style-type: none"> • Add a line item • Define the Cost Element for the line item • Enter the cost and other details.
3.	<p>In this example, you are adding a line item that will detail Domestic Travel costs for the proposal.</p> <p>To begin adding non-personnel line items to your Period 1 Budget</p> <p>Click the Period 1 tab.</p> 
4.	<p>Click the Add Line Item button.</p> 
5.	<p>Double-click in the CE (Cost Element) field.</p> 
6.	<p>All cost elements are listed in alphabetical order.</p> <p>Click the Down button of the scrollbar.</p> 
7.	<p>Click the Travel-Domestic cell.</p>
8.	<p>Click the OK button.</p> 
9.	<p>Enter "Conferences" into the Description field.</p>
10.	<p>Non-personnel line items differ from personnel line items in that you are able to enter the costs manually on the line.</p>
11.	<p>Click in the Cost field.</p> 
12.	<p>Enter "4000" into the Cost field.</p>



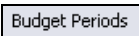
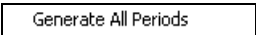

13.	<p>Add another line item for Supplies. This time, use a keyboard shortcut to add a new line item.</p> <p>Press [Ctrl+A].</p>
14.	<p>Double-click in the CE (Cost Element) field.</p> 
15.	<p>Click the Down button of the scrollbar.</p> 
16.	<p>Click the Supplies cell.</p>
17.	<p>Click the OK button.</p> 
18.	<p>Click in the Cost field.</p> 
19.	<p>Enter "15000" into the Cost field.</p>
20.	<p>Continue adding line items in the same fashion.</p>
21.	<p>When you are finished</p> <p>Click the Save button.</p> 
22.	<p>Click the Summary tab.</p> 
23.	<p>In this topic you have learned to enter non-personnel line item to your proposal budget.</p> <p>End of Procedure.</p>

Adding Subcontract Line Items

1.	<p>Most subcontracts are subject to Facilities and Administration (F&A) costs for only the first \$25,000 spent. In Coeus, this translates to: All subcontracts equaling less than \$25,000 will have one line item, subject to F&A.</p> <p>For those budgets where the subcontract cost is greater than \$25,000, there will be <i>two</i> line items:</p> <ul style="list-style-type: none"> • One line item (for the first \$25,000) subject to F&A • One line item (for the balance after the first \$25,000) without any indirect costs applied.
2.	<p>For this proposal budget, we have subcontract costs totaling \$30,000.</p> <p>To begin entering subcontract line items to your Period 1 budget</p> <p>Click the Period 1 tab.</p> 
3.	<p>Click the Add Line Item button.</p> 
4.	<p>Double-click in the CE (Cost Element) field.</p> 
5.	<p>All Cost Elements are listed alphabetically.</p> <p>Click the Down button of the scrollbar.</p> 
6.	<p>You will notice two sets of Cost Elements applying to subcontracts: those where the subcontract monies are less than or equal to \$25,000, and those costs above and beyond the first \$25,000.</p> <p>Each set has the option of applying F&A or Direct Costs to the line item. Your particular funding opportunity (NIH, for example) may require direct cost limitations.</p> <p>Contact your ORD representative for further clarification.</p>
7.	<p>For this line item, we are working with the first \$25,000 of our subcontract costs.</p> <p>Click the Subcontract <=25K cell.</p>
8.	<p>Click the OK button.</p> 






9.	<p>For this exercise, the subcontractor is Johns Hopkins University.</p> <p>Enter "Johns Hopkins". into the Description field.</p>
10.	<p>Click in the Cost field.</p> 
11.	<p>Enter "25000" into the Cost field.</p>
12.	<p>Next, enter a new line item that will account for the balance of the \$30,000 subcontract costs.</p> <p>Press [Ctrl+A].</p>
13.	<p>Double-click in the CE (Cost element) field.</p> 
14.	<p>For the balance of the subcontract costs, since they are <i>above</i> the initial \$25,000, choose the Subcontract > 25k DC cost element.</p> <p>Click the Subcontract >25k cell.</p>
15.	<p>Click the OK button.</p> 
16.	<p>Enter "Johns Hopkins" into the Description field.</p>
17.	<p>Enter "5000" into the Cost field.</p>
18.	<p>When you are finished, save your budget.</p> <p>Click the Save button.</p> 
19.	<p>You have learned how to add subcontract line items to your proposal budget.</p> <p>End of Procedure.</p>




Generating Remaining Budget Periods

1.	<p>After completing the Period 1 budget, it is time to have Coeus generate the remaining budget periods.</p> <p>This procedure can only be performed one time for each budget within Coeus (although you can add or delete line items to later budget periods if necessary) so be certain that all line items necessary for your budget are entered before you proceed.</p>
2.	<p>It is a good idea to verify your inflation rates <i>before</i> you generate your remaining periods. It is these rates that will be applied when this procedure is initiated, and beginning with incorrect rates will cause you problems.</p> <p>For more information about viewing/changing rate in Coeus, please see the topic, <i>Begin Creating the Proposal Budget</i>, at the jump-in point <i>View/Change Institute Rates</i>.</p>
3.	<p>To begin, you must navigate to the proposal budget window.</p> <p>Click the Proposal Budget button.</p> 
4.	<p>Next, choose a budget to work with. In this exercise, since there is only one budget for this proposal, it is already selected.</p> <p>Click the Modify button.</p> 
5.	<p>You can change the comments for a budget at anytime before finalizing your budget.</p> <p>Click in the Comments: field.</p>
6.	<p>Enter "All budget periods". into the Comments: field.</p>
7.	<p>Finally, have Coeus generate the remaining budget periods, applying the appropriate rates.</p> <p>Click the Budget Periods menu.</p> 
8.	<p>Click the Generate All Periods menu.</p> 
9.	<p>Tabs appear detailing all budget periods for your proposal, not just the first budget period.</p>
10.	<p>To view the details of budget period 2</p> <p>Click the Period 2 tab.</p> 



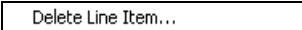



11.	<p>Not only have the line items from Period 1 been copied to the remaining budget periods, the appropriate inflation rates have also been applied (where applicable) and calculated.</p> <p>Click the Period 3 tab.</p> <p><input type="button" value="Period 3"/></p>
12.	<p>The line items and rates have been applied to <i>all</i> periods within the proposal budget.</p> <p>To view the totals for the project</p> <p>Click the Total tab.</p> <p><input type="button" value="Total"/></p>
13.	<p>The Total tab shows all of the line items, subtotaed by period, and totaled for the entire project.</p>
14.	<p>To view the Budget Summary</p> <p>Click the Summary tab.</p> <p><input type="button" value="Summary"/></p>
15.	<p>In this topic you have learned to generate the remaining budget periods for your Proposal Budget, applying appropriate rates.</p> <p>End of Procedure.</p>



Copying a Budget




1.	<p>Coeus strives to be the one and only software package you will need to create, route and submit your proposal. Part of this initiative includes the ability to copy proposal budgets within Coeus, eliminating the need to use another software package (such as Microsoft Excel) to create a base budget and then tweak it to suit your needs.</p> <p>In the proposal development process, you may find the need to draft several versions of your budget in order to determine the best fiscal options for your proposal. Coeus allows you to copy an entire proposal budget (with all periods within that particular budget) or copy the budget with only the period 1 budget period and its cost elements.</p> <p>Coeus allows you to create as many budgets as you need for your proposal; however, you will need to designate <i>one</i> budget as your final budget. For more information, please see the topic <i>Finalizing the Proposal Budget</i>.</p>
2.	<p>To begin copying a proposal budget, you must first navigate to the Proposal Budget window.</p> <p>Click the Edit menu.</p> 
3.	<p>Click the Budget... menu.</p> 
4.	<p>Before you copy a proposal budget, you must choose one to copy. In this case, only one proposal budget has been created for this proposal, so it is already selected.</p>
5.	<p>To begin copying the proposal budget,</p> <p>Click the Copy button.</p> 
6.	<p>Coeus will ask you to determine what parts of the budget you wish to copy.</p> <p>Many people choose to copy the Period One budget only in order to allow Coeus to generate the remaining budget periods after they make the initial changes to Period One.</p>
7.	<p>In this exercise, you choose to copy only the first period within the original budget.</p> <p>Click the OK button.</p> 
8.	<p>To view the data copied from the original proposal</p> <p>Click the Period 1 tab.</p> 
9.	<p>All of the line items from the original budget's first period are copied. You can begin to make changes to the budget at this point.</p>

10.	<p>Close the new budget.</p> <p>Click the Close button.</p> 
11.	<p>Coeus prompts you to save your newly created budget.</p> <p>Click the Yes button.</p> 
12.	<p>Now, open the Proposal Budget window to view your budgets.</p> <p>Click the Proposal Budget button.</p> 
13.	<p>The Proposal Budget window shows the two budgets available for editing.</p>
14.	<p>In this topic you have learned how to copy a proposal budget .</p> <p>End of Procedure.</p>






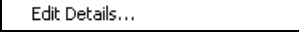
Deleting Budget Line Items






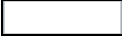

1.	<p>After you have generated all of the remaining periods within your proposal budget, you may find you need to make adjustments to your budget.</p> <p>One such adjustment is by deleting line items that do not belong in all periods (such as an equipment purchase that may only apply to period 1, but not all periods).</p>
2.	<p>For this exercise, you are deleting a non-personnel line item from the Period 3 budget.</p> <p>Click the Period 3 tab.</p> 
3.	<p>For this project, a subcontractor is not needed in the third period, so these line items will be deleted.</p> <p>Click the Subcontract <=25k list item.</p>
4.	<p>Click the Items menu.</p> 
5.	<p>Click the Delete Line Item... menu.</p> 
6.	<p>Coeus confirms your intent to delete a line item from the budget.</p> <p>Click the Yes button.</p> 
7.	<p>The line item has been deleted.</p>
8.	<p>The second subcontract line item is no longer needed in the Period 3 budget, so it too will be deleted.</p> <p>Click the Subcontract >=25k list item.</p>
9.	<p>Another way to delete a line item is to click the Delete button.</p> <p>Click the Delete Line Item button.</p> 
10.	<p>Again, Coeus confirms your intent to delete a line item from the budget period.</p> <p>Click the Yes button.</p> 









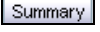
11.	<p>Deleting personnel line items from the budget is a significantly different task.</p> <p>Before you can delete a personnel line item, you must first delete the budget persons designated to that line item. Once <i>all</i> of the budget persons have been deleted from a personnel line item, it may then be deleted from the budget period.</p>
12.	<p>For this exercise, you are deleting the <i>Other Personnel Salary</i> line item from the Period 1 budget.</p> <p>Click the Period 1 tab.</p> 
13.	<p>Click the Other Personnel Salary list item.</p>
14.	<p>Click the Delete Line Item button.</p> 
15.	<p>Coeus warns you that personnel are assigned to the line item and must be deleted first.</p> <p>Click the OK button.</p> 
16.	<p>To view and delete the personnel assigned to this line item</p> <p>Click the Personnel Budget for Line Item button.</p> 
17.	<p>For this line item, there is only one person listed. Since this person is already selected,</p> <p>Click the Delete button.</p> 
18.	<p>Coeus confirms your intent to delete this person from the line item.</p> <p>Click the Yes button.</p> 
19.	<p>At this point the personnel line item no longer contains any personnel, and can now be deleted from the budget.</p>
20.	<p>Click the OK button.</p> 
21.	<p>Click the Delete Line Item button.</p> 
22.	<p>Coeus confirms your intent to delete the line item.</p> <p>Click the Yes button.</p> 


23.	To view the Budget Summary Click the Summary tab. 
24.	Anytime you delete a line item, you need to calculate your budget to reflect the changes you made. Click the Calculate Budget button. 
25.	Once you are finished, save your proposal budget. Click the Save button. 
26.	In this topic you have learned to delete both personnel and non-personnel line items within your proposal budget. End of Procedure.

Adding Budget Line Items






1.	<p>You may find the need to add budget line items for one or more periods.</p> <ul style="list-style-type: none"> • If the line item is needed for only one period, you can simply add the line item to the appropriate period. • If you need to add a line item to several consecutive periods, you add the line item to the first required period and then apply it to later periods.
2.	<p>For this exercise, you are adding an <i>equipment</i> line item to the first budget period. Then, you are adding a <i>service contract</i> (for the equipment) in the subsequent periods of the budget.</p>
3.	<p>To begin adding an equipment line item to Period 1</p> <p>Click the Period 1 tab.</p> 
4.	<p>Click the Add Line Item button.</p> 
5.	<p>Double-click in the CE (Cost Element) field.</p> 
6.	<p>Click the Equipment cell.</p>
7.	<p>Click the OK button.</p> 
8.	<p>Now that the line item has been added, you can view and edit the details for the line item.</p> <p>Click the Items menu.</p> 
9.	<p>Click the Edit Details... menu.</p> 
10.	<p>Add a description for the equipment you would be purchasing.</p> <p>Click in the Description: field.</p>
11.	<p>Enter "Industrial-sized chocolate fountain" into the Description: field.</p>




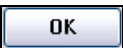

12.	<p>You may also need to make a notation to justify this expense. Coeus allows you to make these notations.</p> <p>If you make a budget justification here within the line item in the budget, only the people viewing your proposal during proposal routing at UMB will be able to view these notations.</p>
13.	<p>If you are required to submit a formal Budget Justification to the sponsor, you must do so by attaching a narrative document to your proposal.</p> <p>For more information on attaching a proposal narrative, please see the topic <i>Uploading a Narrative Document</i>.</p>
14.	<p>To enter a budget justification notation</p> <p>Click the Justify button.</p> 
15.	<p>Enter "For distributing large quantities of liquid chocolate" into the Justification field.</p>
16.	<p>Click the OK button.</p> 
17.	<p>Enter "2" into the Quantity field.</p>
18.	<p>Click in the Cost field.</p> 
19.	<p>Enter "10000" into the Cost field.</p>
20.	<p>Note: The cost entered in the cost field is for the <i>total</i> amount for the line item. Coeus will not calculate the cost based on the quantity you have entered on the line item.</p> <p>For this example, each of the two pieces of equipment costs \$5,000, so the total cost is \$10,000.</p>
21.	<p>Continue to add the Service Agreement for this equipment</p> <p>Click the Period 2 tab.</p> 
22.	<p>Click the Add Line Item button.</p> 
23.	<p>Double-click in the CE (Cost Element) field.</p> 
24.	<p>The Cost elements are listed alphabetically.</p> <p>Double-click the Down button of the scrollbar.</p> 



25.	Click the Service Agreement(s) cell.
26.	Click the OK button. 
27.	Enter " Chocolate fountain maintenance " into the Description field.
28.	Enter " 750 " into the Cost field.
29.	View the details for the line item entered. Click the Items menu. 
30.	Click the Edit Details... menu. 
31.	One thing you may wish to verify when adding line items to a budget period is whether or not inflation is being applied to the line item. You can opt to change this attribute for a line item.
32.	Click the OK button. 
33.	Next, apply this line item to the subsequent periods within the proposal budget. Click the Items menu. 
34.	Click the Apply to later periods menu. 
35.	To view the Period 3 budget (and the new changes made) Click the Period 3 tab. 
36.	The new line item and its applied inflation has been added to the subsequent budget periods.
37.	To view the proposal totals Click the Total tab. 
38.	The Total tab shows all of the line items, subtotaled by period, and totaled for the entire project.
39.	To view the Budget Summary details Click the Summary tab. 

40.	Saving your budget will automatically re-calculate the budget. Click the Save button. 
41.	In this topic you have learned to add budget line items to your proposal and apply these items to later periods within your proposal budget. End of Procedure.


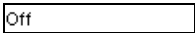




Entering Cost Sharing


1.	<p>Note: UMB has clear policies regarding Cost Sharing. Before a proposal with cost sharing will be submitted to the sponsor, it must be approved by not only the school sponsoring the proposal, but it must also get approval from the Office of Research and Development (ORD). This is true even if the sponsor <i>requires</i> cost sharing for a particular Notice of Opportunity.</p> <p>For more information on UMB's policy regarding cost sharing as well as access to the formal cost sharing approval form visit the Office of Research and Development website.</p>
2.	<p>Cost sharing can be entered two ways within Coeus:</p> <ul style="list-style-type: none"> • <u>Personnel line items</u> - By putting forth more effort than you are charging • <u>Non-personnel line items</u> - By manually entering the amount covered by UMB.
3.	<p>For this exercise, you are entering cost sharing for a personnel line item within the Period 1 Budget.</p>
4.	<p>Click the Period 1 tab.</p> 
5.	<p>In order to enter cost sharing for a personnel line item, you must first identify a budget person whose salary will be partially covered by UMB.</p> <p>Once you have chosen this budget person, you then alter the amount of effort put forth on the proposal or the amount charged.</p>
6.	<p>Click the Personnel Budget for Line Item button.</p> 
7.	<p>Click the % Charged cell.</p> 
8.	<p>Change the % Charged from 5% to 4%.</p> <p>Enter "4" into the % Charged field.</p>
9.	<p>To view the amount of cost sharing for this proposal person</p> <p>Click the Calculate button.</p> 
10.	<p>The amount of cost sharing is reflected.</p> <p>Click the OK button.</p> 

11.	<p>You may wish to enter a budget justification notation for this line item.</p> <p>Double-click the Senior Personnel Salary cell.</p>
12.	<p>Click the Justify button.</p> 
13.	<p>Click in the Justification field.</p>
14.	<p>Enter "Committed Cost Sharing, sponsor required" into the Justification field.</p>
15.	<p>Click the OK button.</p> 
16.	<p>Note: These budget Justification notations are seen only by the people viewing your proposal during routing at UMB.</p> <p>If you are required to submit a formal Budget Justification to the sponsor, you will be doing so by attaching a narrative document to your proposal.</p> <p>For more information on attaching a proposal narrative, please see the topic <i>Uploading a Narrative Document</i>.</p>
17.	<p>To enter cost sharing for non-personnel line items, the amount covered by UMB is entered directly in the line item details.</p>
18.	<p>To enter cost sharing for the Domestic Travel line item</p> <p>Double-click the Travel-Domestic cell.</p>
19.	<p>Click in the Cost Sharing: field.</p> 
20.	<p>Enter "1000" into the Cost Sharing: field.</p>
21.	<p>Click the OK button.</p> 
22.	<p>Note: These Budget Justification Notations are <i>not</i> a substitute for the Cost Sharing Statement and Approval Form that is required to be routed with your proposal if your sponsor requires cost sharing.</p>
23.	<p>When a Budget Justification notation is entered for a line item, the Justification Icon for the line item changes.</p> <p>You can view the justification notations by clicking these icons.</p> <p>Click the Justification button.</p> 






24.	The budget justification notation appears. Click the OK button. 
25.	Click the Save button. 
26.	In this topic you have learned to enter cost sharing for your proposal. End of Procedure.


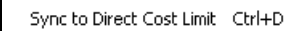


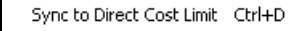


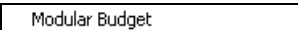
Setting On/Off Campus Rates



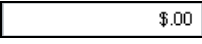




1.	<p>While working within the Coeus budget, it is important to apply the correct applicable rates to the proposal line items within your proposal.</p> <p>At UMB, if more than 50% of your research/work is performed off campus, then the off-campus rates are applied to all line items within your proposal. Likewise, if more than 50% of the work is performed on campus, then the on-campus rates are applied.</p>
2.	<p>Coeus supplies an easy mechanism to apply and/or change the applicable rates to all of the line items within the proposal without changing the applicable rate for each individual line item.</p>
3.	<p>Note: The default setting for proposal budget uses On-Campus rates. You need not alter the On/Off Campus setting if you are applying on-campus rates to your proposal</p> <p>If you need further clarification about the use of On/Off Campus rates, please contact your ORD Representative.</p>
4.	<p>Click the On/Off Campus: list.</p> 
5.	<p>Click the Off list item.</p> 
6.	<p>Coeus confirms your intent to making this sweeping change to all of your line items within your budget.</p> <p>Click the Yes button.</p> 
7.	<p>Next, view the effects of this change.</p> <p>Click the Period 1 tab.</p> 
8.	<p>Double-click the Senior Personnel Salary cell.</p>
9.	<p>The rates for your line items have been changed from On Campus to Off Campus.</p> <p>Click the OK button.</p> 
10.	<p>Note: This procedure is an all or nothing type of change. Making this change will change every line item within your proposal.</p>
11.	<p>Click the Summary tab.</p> 




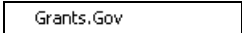


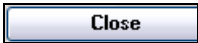

12.	Click the Save button. 
13.	You have learned to apply off-campus rates to your proposal budget line items. End of Procedure.

Creating a Modular Budget

1.	<p>UMB policy requires a detailed budget for all proposals being submitted on behalf of UMB, <i>even if your sponsor only requires a Modular Budget to be submitted.</i></p> <p>In this case, having a detailed budget works to your advantage because Coeus will help build your Modular Budget from the figures in your Detailed Budget.</p>
2.	<p>Coeus will build a Modular Budget using the values from your Detailed Budget. However, there are a few caveats:</p> <ul style="list-style-type: none"> • Coeus does not understand that NIH has a \$250,000 Direct Cost per period limit on Modular Budgets. You will need to be certain your Detailed Budget does not exceed this value. • Coeus will not round your period Direct Cost values up or down. You will need to tidy your detailed budget before working with the Modular Budget. • You will need to note the Consortium (Subcontract) F&A from your detailed budget (if applicable) for manual entry in the Modular Budget window.
3.	<p>First, you will round the Direct Cost values within each of your budget periods.</p> <p>Click the Period 1 tab.</p> 
4.	<p>We would like our Direct Costs for Period 1 to be \$100,000.</p> <p>Enter "100000". into the Direct Cost Limit: field.</p>
5.	<p>And the Other Operating Expenses will be rounded up or down to meet this value.</p> <p>Click the Other Operating Expenses cell.</p>
6.	<p>Click the Items menu.</p> 
7.	<p>Click the Sync to Direct Cost Limit menu.</p> 
8.	<p>Coeus has recalculated the value for the Other Operating Expenses to bring the Direct Costs for Period 1 to \$100,000.</p>
9.	<p>Perform the same steps for Period 2 and Period 3.</p> <p>Click the Period 2 tab.</p> 
10.	<p>Click in the Direct Cost Limit: field.</p> 


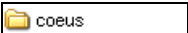

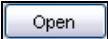





11.	Enter " 75000 ". into the Direct Cost Limit: field.
12.	Click the Other Operating Expenses cell.
13.	Click the Items menu. 
14.	Click the Sync to Direct Cost Limit menu. 
15.	Again, for Period 3. Click the Period 3 tab. 
16.	Enter " 75000 " into the Direct Cost Limit: field.
17.	Click the Other Operating Expenses cell.
18.	Click the Items menu. 
19.	Click the Sync to Direct Cost Limit menu. 
20.	Click the Summary tab. 
21.	Click the Save button. 
22.	Your detailed budget is tidy, with \$250,000 in direct costs for the proposal. You are now ready to create your Modular Budget.
23.	Begin creating your Modular Budget . Click the Modular Budget option. 
24.	Next, navigate to the Modular Budget window. Click the Edit menu. 
25.	Click the Modular Budget menu. 
26.	The Modular Budget window displays.


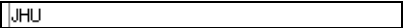

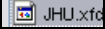
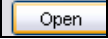


27.	<p>Your Detailed Budget may already be synchronized with the Modular Budget window. If not, you will need to manually synchronize your budget.</p> <p>Click the Sync button.</p> 
28.	<p>Coeus confirms this action.</p> <p>Click the Yes button.</p> 
29.	<p>Note: Each time you click the Sync button, Coeus will place its suggested values for the budget. If you enter your own values into the Modular Budget and click the Sync button, your values will be overwritten with the values Coeus chooses.</p>
30.	<p>Coeus bases its suggestions for budget modules (in the standard \$25,000 increments) on the Indirect Cost Base from your Detailed Budget.</p> <p>You can edit any of these fields if the values suggested by Coeus do not reflect the modular budget you are hoping to submit to the sponsor.</p>
31.	<p>Each period within your Detailed Budget is represented in the Modular Budget.</p>
32.	<p>Note: The Modular Budget does not currently synchronize the Consortium (Subcontract) F&A from your detailed budget. You will need to enter this value manually, if it applies to your particular budget.</p>
33.	<p>Click in the Consortium F&A: field.</p> 
34.	<p>For this exercise enter "12500" into the Consortium F&A: field.</p>
35.	<p>To view the Period 2 Modular Budget</p> <p>Click the Period 2 tab.</p> 
36.	<p>To view the Cumulative values for the Modular Budget</p> <p>Click the Cumulative tab.</p> 
37.	<p>The Cumulative tab shows the breakout of the Total Direct Costs and Total Indirect Costs for the proposal.</p>
38.	<p>Click the Period 1 tab.</p> 
39.	<p>When you are satisfied with your Modular Budget</p> <p>Click the OK button.</p> 

40.	<p>You have made a change to the proposal budget by adding a Modular Budget. Save the budget.</p> <p>Click the Save button.</p> 
41.	<p>Next, you will need to be certain your Modular Budget form will be submitted to the sponsor. Close the budget.</p> <p>Click the Close button.</p> 
42.	<p>If you have chosen to attach a Modular Budget to your proposal, you will need to be certain that the PHS398 Modular Budget Form is selected in the Grants.gov Submission Details window or it will not be attached when your proposal is submitted to the sponsor.</p>
43.	<p>Click the Action menu.</p> 
44.	<p>Click the Grants.Gov menu.</p> 
45.	<p>Click the Forms tab.</p> 
46.	<p>Be sure to select the Check Box that will include the proper Modular Budget form with your proposal.</p> <p>Notice that neither the Modular Budget nor the Detailed Budget form is selected. Coeus makes <i>no</i> assumptions with regard to which budget form you wish to submit.</p> <p>Click the option.</p> 
47.	<p>Once you have chosen the correct form</p> <p>Click the Close button.</p> 
48.	<p>Coeus prompts you to save your proposal.</p> <p>Click the Yes button.</p> 
49.	<p>You have now learned to create a Modular Budget from a Detailed Budget. End of Procedure.</p>





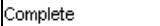


Upload the Subaward Budget


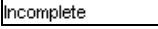









1.	<p>When submitting an NIH detailed budget with subcontractors, you will need to attach the RR Subaward Budget file to your proposal budget. The Subaward Budget file is a file that is completed in PureEdge and saved and then uploaded to Coeus.</p> <p>You have two options for accomplishing this task:</p> <ul style="list-style-type: none"> • Email the subaward budget form to the subrecipient institution(s) for completion <ul style="list-style-type: none"> ‡ Subrecipient then emails the completed subaward budget back to PI/department at UMB ‡ PI/department then uploads the file to Coeus <p><u>Or:</u></p> <ul style="list-style-type: none"> • UMB completes the subaward budget for the subrecipient(s) <ul style="list-style-type: none"> ‡ Subrecipient provides their detailed budget spreadsheet, institutional DUNS number, and budget justification to PI/department ‡ PI/department completes and saves the Subaward budget ‡ PI/department uploads into Coeus <p>You need to attach a separate RR Subaward Budget file for each unique institution acting as a role of a subcontractor on the proposal.</p>
2.	<p>Note: You must use the correct RR Subaward Budget form. The UMB Coeus webpage is the only place you will find this file.</p> <p>Do not use the file found on Grants.gov.</p>
3.	<p>From within the proposal budget</p> <p>Click the Edit menu.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Edit</div>
4.	<p>Click the Sub Award menu.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Sub Award</div>
5.	<p>The subaward budget window appears.</p> <p>The steps to completing this task are:</p> <ul style="list-style-type: none"> • Add the Subaward Budget Module • Identify the organization acting as a subcontractor • Upload the PureEdge XFD file • Translate the document form the PureEdge XFD file to the Coeus XML file

6.	<p>First, add the subaward budget module.</p> <p>Click the Add button.</p> 
7.	<p>Locate the pre-saved XFD file on your workstation</p> <p>Double-click the coeus list item.</p> 
8.	<p>Click the JHU.xfd list item.</p> 
9.	<p>Click the Open button.</p> 
10.	<p>Next, identify the organization acting as the subcontractor</p> <p>Double-click the Organization Name cell.</p> 
11.	<p>For this exercise, your subcontractor is Johns Hopkins University.</p> <p>Enter "JHU" into the Organization Name field.</p>
12.	<p>The Coeus file indicator shows the file was successfully uploaded as an XFD File.</p> <p>Next, you must translate this file to the XML format that Coeus recognizes.</p>
13.	<p>The Coeus file indicator shows the file was successfully uploaded as an XFD File.</p> <p>Next, you must translate this file to the XML format that Coeus recognizes.</p>
14.	<p>Click the Translate button.</p> 
15.	<p>The file indicator shows the XFD file has been successfully translated to XML.</p>
16.	<p>If you have multiple subrecipients for this proposal, attach as many Subaward Budget forms as required.</p> <p>Click the Add button.</p> 
17.	<p>Click the Yale.xfd list item.</p> 
18.	<p>Double-click in the Organization Name field.</p> 
19.	<p>For this exercise</p> <p>Enter "Yale" into the Organization name field.</p>

20.	Click the Translate button. 
21.	If you find the need to replace one of the uploaded XFD documents, simply upload a new document, overwriting the original document.
22.	Replace the original XFD file for the Johns Hopkins subrecipient. Click the Johns Hopkins cell. 
23.	Click the Upload XFD button. 
24.	Click the JHU.xfd list item. 
25.	Click the Open button. 
26.	Since you uploaded a new XFD document, you will need to translate this newly uploaded file. Click the Translate button. 
27.	When you are finished uploading the Subaward Budget file(s) Click the OK button. 
28.	You have learned to upload and translate the Subaward Budget file. End of Procedure.





Finalizing the Budget




1.	You can work on as many different budget versions as you need within your proposal in Coeus. However, before you submit your proposal for routing you will need to designate one version as the <i>Final Budget</i> that will be transmitted to the sponsor.
2.	<p>There are two ways you can finalize your budget:</p> <ul style="list-style-type: none"> • In the Select Budget window • From the Budget Summary panel <p>After you have marked a particular budget as the Final version, you will also need to mark the budget as Complete before you can submit your proposal for routing.</p>
3.	<p>First, navigate to the Select Budget window.</p> <p>Click the Proposal Budget button.</p> 
4.	<p>At the Select Budget window, choose a Final budget and</p> <p>Click the Final option.</p> 
5.	<p>Coeus confirms your intent to mark the budget as final.</p> <p>Click the Yes button.</p> 
6.	<p>Next, Coeus does not consider the budget finalized until you mark your budget "Complete."</p> <p>Click the Budget Status: list.</p> 
7.	<p>Click the Complete list item.</p> 
8.	<p>Click the OK button.</p> 
9.	Coeus now shows the Budget Module for your proposal as Complete.
10.	You can always go back and modify your proposal budget (even after you have marked it as Final and complete) up until the point where you submit your proposal for routing. At that time, the budget marked as final will be the budget submitted to the sponsor.
11.	<p>To make changes to a budget marked as Final and Complete</p> <p>Click the Proposal Budget button.</p> 




12.	<p>First, remove the Complete designation from your final budget.</p> <p>Click the Budget Status: list.</p> 
13.	<p>Click the Incomplete list item.</p> 
14.	<p>Next, remove the Final designation from your proposal.</p> <p>Click the Final option.</p> 
15.	<p>Coeus will confirm that you are about to change your mind.</p> <p>Click the Yes button.</p> 
16.	<p>You can now modify your budget.</p> <p>Click the Modify button.</p> 
17.	<p>You can also designate the active budget as Final and Complete from within the Budget Summary panel of that budget.</p>
18.	<p>To begin,</p> <p>Click the Final option.</p> 
19.	<p>Coeus confirms your intent to mark the active budget as the final budget.</p> <p>Click the Yes button.</p> 
20.	<p>Next, mark the budget as Complete.</p> <p>Click the Budget Status: list.</p> 
21.	<p>Click the Complete list item.</p> 
22.	<p>Close the Budget.</p> <p>Click the Close button.</p> 
23.	<p>Coeus prompts you to save your budget after making the change to its status.</p> <p>Click the Yes button.</p> 






24.	In this topic you have learned how to finalize your budget before submitting your proposal. End of Procedure.
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Searching for Proposals

1.	<p>There are two ways to bring up search windows within Coeus:</p> <ul style="list-style-type: none"> • By choosing <u>Maintain</u> functions (e.g., Maintain Proposal Development) • By clicking the <u>Search</u> icon within the toolbar within a Coeus module.
2.	<p>To begin, click the Maintain menu.</p> 
3.	<p>Click the Proposal Development ... menu.</p> 
4.	<p>Each time you choose a Maintain function, Coeus assumes you wish to search for an existing proposal, award, etc., and presents you with a Search window.</p> <p>The search windows have numerous columns which act as search fields for your queries.</p> <p>You will notice that there are horizontal and vertical scrollbars that allow you to view more columns of search fields or rows in which to enter multiple criteria for your queries.</p>
5.	<p>Coeus has various Wildcards available when utilizing the search windows.</p> <p>* Use the * operator to indicate that there may be any number of unspecified characters before or after the text.</p> <p>_ Use the _ operator to indicate one unknown character in that position.</p> <p>< or > Use these operators to indicate all values less than or greater than the value that follows.</p> <p><= or >= Use these operators to indicate all values less than or equal to or greater than or equal to the value that follows.</p>
6.	<p>For this exercise, you will search by proposal number -- specifically proposal 00000223.</p>
7.	<p>To begin, click in the first cell in the Proposal Number column.</p> 
8.	<p>The * wildcard is used to assist searches.</p> <p>Enter "*223" in the Proposal Number search field.</p>
9.	<p>Click the Find button.</p> 
10.	<p>The search results show the proposal 00000223.</p>

11.	<p>To begin a new search,</p> <p>Click the Search for Proposal button.</p> 
12.	<p>For the next exercise, you will search by Investigator. This search is useful when searching for all the proposals you have created, and/or to view the status of proposals submitted for routing.</p> <p>Suppose Dr. Kingsbury would like to view all of her proposals that are still awaiting final approval.</p>
13.	<p>To begin, click the top cell in the Investigator column.</p> <input data-bbox="380 604 540 642" type="text"/>
14.	<p>Again, use the * wildcard to assist you in your search.</p> <p>Enter "kings*" in the Investigator column.</p>
15.	<p>Click the Find button.</p> 
16.	<p>Decision: Your search has brought back too many results! Which option would you like to choose?</p> <ul style="list-style-type: none"> • Narrow the results Go to step 17 on page 2 • Sort the results Go to step 37 on page 4
17.	<p>To begin narrowing your results, bring back the proposal search window.</p> <p>Click the Search for Proposal button.</p> 
18.	<p>This time, you will enter two different criteria for your search. You will search by Investigator and by Status.</p>
19.	<p>To begin, click the top cell in the Investigator column.</p> <input data-bbox="380 1413 540 1451" type="text"/>
20.	<p>Again, use the * wildcard to assist you in your search.</p> <p>Enter "kings*" in the Investigator column.</p>
21.	<p>Some fields within the search window have drop-down lists from which you can choose your search criteria. However, you will not know which columns have this type of search fields until you click the cell within that column.</p>
22.	<p>Click the top cell in the Status column.</p> <input data-bbox="380 1724 557 1761" type="text"/>
23.	<p>Click the Approval In Progress list item.</p> <input data-bbox="380 1808 586 1845" type="text"/>

24.	<p>The database is queried by the criteria selected for all proposals where both the <i>approval is in progress</i> and belonging to all investigators where the last name begins with <i>kings</i>.</p> <p>Click the Find button.</p> 
25.	The search results show all of Dr. Kingsbury's proposals that are awaiting final approval.
26.	Suppose Dr. Kingsbury wishes to view the status of all of her proposals that have a deadline date between 02/01/2007 and 07/01/2007 .
27.	<p>Click the Search for Proposal button.</p> 
28.	<p>Click the first cell in the Deadline Date column.</p> <input data-bbox="380 676 542 709" type="text"/>
29.	<p>Since the <i>beginning</i> of the range of proposals you would like to see has a deadline date of February 1, 2007</p> <p>Enter ">01/31/2007" in the Deadline Date cell.</p>
30.	<p>Click the second cell in the Deadline Date column.</p> <input data-bbox="380 907 542 940" type="text"/>
31.	<p>Next, since the <i>end</i> of the range of results you would like to see is the end of the fiscal year</p> <p>Enter "and <07/01/2007".</p>
32.	<p>Note: The word and is important for this search.</p> <p>If you do not add this operator in your search criteria this would bring back results matching the criteria in cell 1 or cell 2, but <i>not</i> necessarily matching <i>both</i> criteria.</p>
33.	<p>Click the Find button.</p> 
34.	The narrowed results are displayed.
35.	<p>Decision: Would you like to:</p> <ul style="list-style-type: none"> • Continue to the end of the topic Go to step 36 on page 3 • Narrow the results Go to step 17 on page 2 • Sort the results Go to step 37 on page 4
36.	<p>You have now learned to search for proposals, use wildcards to perform your searches, and sort your results.</p> <p>End of Procedure. Remaining steps apply to other paths.</p>

<p>37.</p>	<p>If your search in Coeus brings back more results than you anticipated, there two effective ways you can sort your results to find what you are looking for:</p> <ul style="list-style-type: none"> • Single Field Sort • Multiple Field Sort <p>Use the Single Field Sort if you would like to sort your results by only one criteria, such as sorting your results by status. Use the Multiple Field Sort to sort your results by multiple criteria, such as sorting your results by PI and then by Deadline Date.</p>
<p>38.</p>	<p>Within the Coeus Search windows, the column headers act as the various search criteria within the search results.</p> <p>To sort by the Single Field Sort option, choose and click the column header. For example, you can sort the displayed results by Status.</p> <p>Click the Status column header.</p> 
<p>39.</p>	<p>The first time you click on a column header the results are sorted in ascending order. The column header indicates that the results are sorted with an upward-pointing arrow.</p> <p>Click the Status column header.</p> 
<p>40.</p>	<p>The second time you click on a column header the results are sorted in descending order. The column header indicates that the results are sorted with a downward-pointing arrow.</p> <p>Click the Status column header.</p> 
<p>41.</p>	<p>Additionally, Coeus allows you to sort by more than one search criteria simultaneously through the Sort window.</p> <p>Click the Sort Proposals button.</p> 
<p>42.</p>	<p>The Sort window is made up of two separate sections - columns available for sorting and columns you have chosen for sorting.</p> <p>To choose the columns you wish to sort by, simply click and drag the option from the left section to the right section.</p>
<p>43.</p>	<p>The sort options Status and Deadline Date are selected as the sort criteria.</p> <p>By default, they will be sorted in ascending order as indicated by the Ascending checkbox. To sort in descending order, click the box to deselect that option.</p> <p>Click the OK button.</p> 
<p>44.</p>	<p>The sorted results are displayed.</p> <p>Go to step 35 on page 3</p>