









Coeus





**Proposal Narrative Writer
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>










Uploading a Narrative Document

1.	<p>Before you can attach a narrative to a proposal, you must first either begin a new proposal or navigate to an existing proposal within Coeus.</p> <p>For this exercise, you will be attaching a narrative to an existing proposal. To learn more about creating a new proposal, please see the topic Completing Proposal Details.</p>
2.	<p>To begin navigating to your proposal</p> <p>Click the Maintain menu.</p> 
3.	<p>Click the Proposal Development ... menu.</p> 
4.	<p>You are attaching narrative documents to proposal 00000699. To begin searching for the proposal</p> <p>Click in the Proposal Number field.</p> 
5.	<p>Use the wildcard * to assist you in your search.</p> <p>Enter "*699". into the Proposal Number field.</p>
6.	<p>Click the Find button.</p> 
7.	<p>The search results display a one-line description of proposal # 00000699.</p> <p>To open the proposal for editing, click the "edit" button.</p> <p>Click the Modify Selected Proposal button.</p> 
8.	<p>When you begin editing a proposal, you see the Proposal Details. The Aggregator for the proposal enters the pertinent information about the proposal on these tabbed pages.</p>
9.	<p>In the upper right-hand corner of the Proposal Details window is a status indicator for the main portions of the proposal - namely the Budget and the Narrative modules.</p> <p>There are three possible status indicators:</p> <ul style="list-style-type: none"> • Narrative Modules Not Created • Narrative Modules In Progress • Narrative Modules Complete <p>Your job, as the narrative writer, is not complete until you have a green check next to the Narrative status indicator.</p>


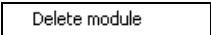

10.	<p>To begin attaching a narrative document, navigate to the Proposal Narrative section.</p> <p>Click the Edit menu.</p> 
11.	<p>Click the Narrative... menu.</p> 
12.	<p>Attaching proposal narratives involves three steps:</p> <ul style="list-style-type: none"> • Add a Narrative Module • Attach narrative document to the Narrative Module • Label your narrative Complete
13.	<p>To add a new Narrative Module</p> <p>Click the Add module button.</p> 
14.	<p>When choosing Narrative Types, please be aware that you may only include one of a particular type of Narrative for your proposal.</p> <p>For example, you can only attach one file that is a Bibliography, one file that is an Equipment narrative, etc.</p> <p>There are exceptions, and these will be covered later in this topic.</p>
15.	<p>To choose a Narrative Type</p> <p>Click the Narrative Type: list.</p> 
16.	<p>Coeus has many Narrative Types available to choose from. For this example, you are attaching a Bibliography.</p> <p>Click the Bibliography list item.</p>
17.	<p>Depending on the Narrative Type chosen, the Module Title may be optional. In this exercise, one will be added.</p> <p>Click in the Module Title: field.</p>
18.	<p>Enter "Bibliography" into the Module Title: field.</p>
19.	<p>The contact information for the Narrative Module <i>is</i> optional.</p> <p>However, if you are collaborating with others on your proposal, you may wish to add some information so other members of your team know who contributed which Narrative Document to the proposal.</p>

20.	To begin adding contact information Click in the Contact Name: field. <input type="text"/>
21.	Enter " Dr. Kingsbury " into the Contact Name: field.
22.	Click in the Phone Number: field. <input type="text"/>
23.	Enter " 68000 " into the Phone Number: field.
24.	The Narrative Module details have been entered. Next, you need to attach a document to the Narrative Module. Coeus allows you to attach any document type you wish to upload. Deciding which document type to attach will depend upon your sponsor's requirements for your proposal.
25.	Note: Before you attach any Narrative Documents to Coeus, be certain you have removed all headers and footers from the documents before uploading. Failure to do so will result in improperly formatted documents, as well as the possibility of generating warnings/errors when submitting your proposal to Grants.gov.
26.	For this example, you will upload an Adobe PDF document. Click the Upload button. <input type="button" value="Upload"/>
27.	Begin searching for your document on your local workstation or network drive. Click the coeus list item. <input type="text" value="coeus"/>
28.	Click the Open button. <input type="button" value="Open"/>
29.	Click the Bibliography.pdf list item. <input type="text" value="Bibliography.pdf"/>
30.	Click the Open button. <input type="button" value="Open"/>
31.	Your Narrative Document is now attached to the proposal. Finally, the status for your Narrative needs to be changed from Incomplete to Complete.
32.	Click the Status: list. <input type="text" value="▼"/>
33.	Click the Complete list item. <input type="text" value="Complete"/>






34.	<p>To view the uploaded document</p> <p>Click the View button.</p> 
35.	<p>The document opens in its own window. When you are finished viewing the document</p> <p>Click the Close button.</p> 
36.	<p>Click the OK button.</p> 
37.	<p>Add another Narrative Module.</p> <p>Click the Add module button.</p> 
38.	<p>Choose a Narrative Type</p> <p>Click the Narrative Type: list.</p> 
39.	<p>This time, you choose a generic Narrative Type.</p> <p>Click the Other list item.</p>
40.	<p>Narrative Types Other, Other Attachments Form, and Personal Data are exceptions to the rules.</p> <p>You may have any number of modules with these Narrative types, each with a different file attached.</p>
41.	<p>Click in the Module Title: field.</p>
42.	<p>Enter "specificfilename.pdf" into the Module Title: field.</p>
43.	<p>For "Other" Narrative Types, the Module title is required. Additionally, whatever text you enter in this field becomes the filename that is transmitted to Grants.gov for the attached document (overwriting the filename originally uploaded.)</p> <p>This is helpful especially if the sponsor requires a specific filename for a narrative document. Simply choose Other and enter the specified filename in the Module Title field.</p>
44.	<p>Again, the contact information is optional, but we will enter it in this example.</p> <p>Click in the Contact Name: field.</p> 
45.	<p>Enter "Dr. Kingsbury" into the Contact Name: field.</p>

46.	<p>Click in the Phone Number: field.</p> 
47.	<p>Enter the desired information into the Phone Number: field.</p> <p>Enter "68000".</p>
48.	<p>Click the Upload button.</p> 
49.	<p>Again, you decide to attach an Adobe PDF document.</p> <p>Click the coeus object.</p> 
50.	<p>Click the Open button.</p> 
51.	<p>Click the Narrative.pdf list item.</p> 
52.	<p>Click the Open button.</p> 
53.	<p>When you are finished</p> <p>Click the OK button.</p> 
54.	<p>You can also view the uploaded document from within the Proposal Narratives window.</p> <p>Click the Narrative Document object.</p> 
55.	<p>The document opens in its own window. When you are finished viewing the document</p> <p>Click the Close button.</p> 
56.	<p>You have now successfully logged in to Coeus and attached narrative modules to a proposal.</p> <p>End of Procedure.</p>


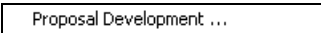



Delete a Narrative Document






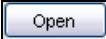
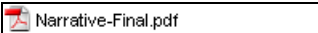
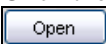

1.	<p>Note: Do <u>not</u> use this method if you only wish to replace a document attached to a Narrative Module with a recently revised document.</p> <p>You can easily update a Narrative Document. Please see topic Modify Narrative Document for more information.</p>
2.	<p>In this example you will delete Narrative Module number two.</p> <p>Click the Module No. 2 cell.</p>
3.	<p>Click the Edit menu.</p> 
4.	<p>Click the Delete module menu.</p> 
5.	<p>If you are certain you want to delete the Narrative Module (and the document attached to the module)</p> <p>Click the Yes button.</p> 
6.	<p>Alternatively, you can select the Narrative Module you wish to delete and click the Delete Narrative Module button in the toolbar.</p>
7.	<p>You have learned to delete a Narrative Module--and the document attached to the module.</p> <p>End of Procedure.</p>

Modify Narrative Document

1.	<p>Throughout the course of the proposal development process narrative documents are written and re-written. Coeus allows for the changes without the need for you to delete the entire module (and subsequently the attached narrative document.)</p> <p>Basically, the procedure for modifying the narrative document involves choosing the Narrative Module, and uploading a narrative document--the same steps performed to attach the original document. However, in this case the <u>new</u> document will overwrite the document previously attached.</p>
2.	<p>In this exercise you will be revising the document attached to Narrative Module number one.</p> <p>Click the Module No. 1 cell.</p>
3.	<p>Click the Upload Attachment button.</p> 
4.	<p>Search for your narrative file.</p> <p>Click the coeus list item.</p> 
5.	<p>Click the Open button.</p> 
6.	<p>Click the Narrative-Final.pdf list item.</p> 
7.	<p>Click the Open button.</p> 
8.	<p>The new document is now attached, overwriting the original document.</p>
9.	<p>You have learned to modify an existing narrative document attached to a Narrative Module.</p> <p>End of Procedure.</p>



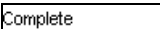



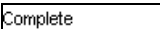
Modifying a Narrative Document During Approval Routing



1.	<p>After you have submitted your proposal for approval you have the ability to attach an updated version of a narrative document, so you can start your routing with <i>draft</i> narrative documents in the Narrative Module.</p> <p>While the proposal is in routing, the PI or administrator can upload new files to <i>replace existing files</i>. This is possible throughout the entire routing cycle. Once the proposal is submitted to the sponsor, however, you cannot upload <u>any</u> new narrative modules. If you update narrative documents during routing, any person that has already approved the proposal is sent an e-mail to alert him/her that the narratives were revised. That way, if the person wishes, he/she can go back to reread the narratives.</p> <p>However, <i>you cannot create new narrative types after routing has begun</i>. That is, if the proposal contains a narrative type of Bibliography when the routing is initiated, then you can upload and replace the attached document for that narrative type. But if the PI forgot to add the Facilities narrative type, for example, then the proposal must be rejected, since there was no narrative type of Facilities to replace. The PI must then create a Facilities narrative type and resubmit for approval.</p> <p>Your final narrative files are due to the Office of Research and Development no later than 5 business days prior to the sponsor deadline.</p>
2.	<p>To begin uploading a new narrative document, you first need to search for your proposal.</p> <p>Click the Maintain menu.</p> 
3.	<p>Click the Proposal Development ... menu.</p> 
4.	<p>Click in the Proposal Number field.</p> 
5.	<p>You will use the * wildcard to search for proposal 00000081.</p> <p>Enter "*81" into the field.</p>
6.	<p>Click the Find button.</p> 
7.	<p>Usually, when you want to modify a proposal you would</p> <p>Click the Modify selected Proposal button.</p> 

8.	<p>However, once the proposal has been submitted for approval, the proposal is locked and cannot be edited in the usual fashion.</p> <p>Click the OK button.</p> 
9.	<p>In order to attach a revised narrative document, you will need to edit the Narrative directly.</p> <p>Click the Edit menu.</p> 
10.	<p>Click the Narrative menu.</p> 
11.	<p>In this example you will be attaching a revised Narrative Document to Narrative Module number two.</p> <p>Click the Proposal No. 2 list item.</p>
12.	<p>Click the Upload Attachment button.</p> 
13.	<p>Search for the document you wish to attach.</p> <p>Click the coeus list item.</p> 
14.	<p>Click the Open button.</p> 
15.	<p>Click the Narrative-Final.pdf list item.</p> 
16.	<p>Click the Open button.</p> 
17.	<p>The new revised document is attached, replacing the original document.</p> <p>Keep in mind: Be sure the documents you upload do <u>not</u> contain any headers or footers. Failing to remove the headers and footers before uploading your documents can result in errors/warnings when submitting your proposal to Grants.gov.</p>
18.	<p>When you are finished uploading revised Narrative Documents</p> <p>Click the Close button.</p> 



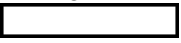

19.	You have now learned to modify a narrative document after your proposal has been submitted for approval. End of Procedure.
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Update Module Details




1.	Coeus allows you to update the Narrative Module details without deleting and recreating a new Narrative module.
2.	To begin updating Narrative Module No. 2 Click the Module Number 2 list item.
3.	Click the Modify module button. 
4.	For this exercise, you will change the Narrative Module status from <i>Incomplete</i> to <i>Complete</i> and add a comment to the Narrative Module.
5.	Click the Status: list. 
6.	Click the Complete list item. 
7.	Next, add a comment to the Narrative Module Details. Click in the Comments: field.
8.	Enter " Final Revision " into the Comments: field.
9.	Click the OK button. 
10.	Next, we will practice changing the status for Narrative Module No. 3 from <i>Incomplete</i> to <i>Complete</i> . Click the Module Number 3 cell.
11.	Click the Modify module button. 
12.	Now, change the status from <i>Incomplete</i> to <i>Complete</i> by choosing the appropriate Status . Click the Status: list. 
13.	Click the Complete list item. 






14.	<p>Click the OK button.</p> 
15.	<p>When you are finished editing the Narrative Module details</p> <p>Click the Close button.</p> 
16.	<p>Notice that the Narrative Status has been changed from In Progress to Complete.</p>
17.	<p>While Coeus believes the Narrative section of your proposal is complete, this may not be the case. Coeus does not know which narratives are required from your sponsor, for your proposal. You will need to be diligent about reading the sponsor instructions for your proposal and be sure to include any and all proposal narratives required by your sponsor.</p>
18.	<p>You have now learned to make changes to the Narrative Module details for a Narrative Module previously attached to a proposal.</p> <p>End of Procedure.</p>

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="380 676 540 709" 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="380 903 540 936" 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 check-box. 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>