

# Coeus Electronic Document Storage

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# Agenda

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- Overview
- CoeusLite My Awards
- PI/Co-I Access to My Awards: Project Documents
- Roles Database Integration for My Awards Roles
- New Coeus User Roles for Electronic Documents
- Document Types & Naming Conventions
- Resources

# Why Electronic Document Storage?

- A Digital MIT initiative to reduce paper, improve access and streamline workflow
- EDS enables 24/7 access to Institute Proposal and Award documents for all research stakeholders
- Aug 2012 – all Development Proposals created and stored in Coeus





# Coeus Electronic Document Storage

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**April 2013** – OSP started attaching documents to Institute Proposals

**January 14, 2014** – OSP started attaching documents to Award accounts

- All active NSF, NIH, ONR and DOE awards
  - Awards and Mods – Retroactive
  - Other associated documents – Going forward only
  
- All other sponsors – Going forward only



# Coeus Electronic Document Storage

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## Institute Proposal Attachments

- Only documents not available in the Dev Proposal are uploaded as IP Documents
  - Examples: JIT submissions, Reps & Certs

## Award Attachments

- In general, all documents related to the award are attached at parent level
  - Examples: Agreements, mods, extension requests, sponsor approvals
- Exceptions (attached to child accounts) include:
  - Task Orders/RPPs under master agreement
  - Fabricated Equipment approvals

# Coeus Electronic Document Storage

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## Moving toward paperless!

- Storage of paper files discontinued going forward
- Awards received before 1/14/14 will have some documents in paper file, some electronic

## Future process changes:

- Electronic document storage will enable streamlined process for communicating new awards/mods and account set ups/changes by OSP to DLCs/PIs

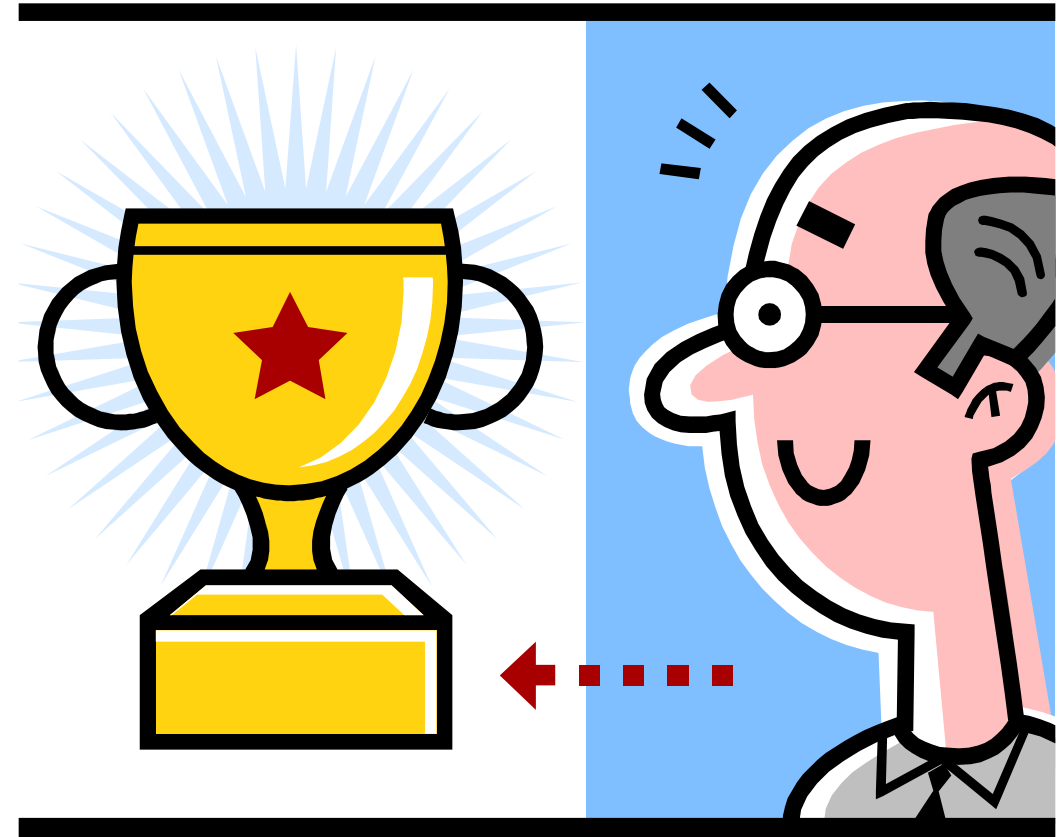


# CoeusLite: My Awards

Provides authorized users one-stop access to documents linked to an award across modules (Development Proposal, Institute Proposal, Award)

PI/Co-I does not require a Coeus role – access requires up-to-date Certificates

DLC may limit authorizations to view documents for a specific module, or across all modules



# PI My Awards: Project Documents

## Award Summary

- PI select an award from the **My Award List** of parent level awards (-001) on which he or she is a PI or Co-I
- Award Summary** includes Account, Award Type, Account Type, Effective Date and Personnel, Schedule and Special Reviews, Money and End Dates
- PI at parent level (lead/contact) has **Project Documents** link in left Navigation

**CoeusLite** Logged in User is PI → User: Haskell, Edward

[Current Locks](#)

[Coeus Home](#) [My Proposals](#) **[My Awards](#)** [My COI](#) [Inbox](#) [My ARRA](#) [Logout](#)

[Award Search](#)

**Award Summary** >>

[Key Person Maintenance](#)

**[Project Documents](#)**

[My Award List](#)

Account No. : 6777771 ( Restricted - No Postings Allowed)      Award No. : 022597-001  
Sponsor : DOE - Office of ARPA-E (000221)      Activity Type : Organized Research  
Sponsor Award No. : DE-AR0000000      Award Type : Cooperative Agreement  
Prime Sponsor :      Account Type : Regular  
Title : Advanced Energy Research      Lead Unit : 150001 - Center for Coeus Training

Effective Date and Personnel		Schedules and Special Reviews	
Pre Award Effective Date :		Approved Equipment <input type="checkbox"/>	Cost Sharing <input checked="" type="checkbox"/>
Award Effective Date :	01-SEP-2010	Approved Subcontract <input type="checkbox"/>	Indirect Cost <input checked="" type="checkbox"/>
Investigators :	(PI) Haskell, Edward(150001) Hensler, Judith(391000)	Approved Foreign Trip <input type="checkbox"/>	Transfer Sponsor <input type="checkbox"/>
Key Persons :	Cleaver, Theodore Mondello, Larry	Payment Schedule <input type="checkbox"/>	
		Special Reviews: Status Protocol # Appr Date	
		No Special Reviews present	

**Money And End Dates**

Award Number	Obligated Distributable	Anticipated Distributable	Obligation Effective Date	Obligation Expiration Date	Final Expiration Date
022597-001	\$0.00	\$0.00	01-Sep-2010	31-Dec-2013	31-Dec-2013



# PI My Awards: Project Documents

## Project Documents

- PI at parent level (lead/contact) has access to files for the entire project structure in one view, including all child awards that have associated documents

Account No. : 6777771 ( Restricted - No Postings Allowed )	Award No. : 022597-001
Sponsor : DOE - Office of ARPA-E (000221)	Activity Type : Organized Research
Sponsor Award No. : DE-AR0000000	Award Type : Cooperative Agreement
Prime Sponsor :	Account Type : Regular
Title : Advanced Energy Research	Lead Unit : 150001 - Center for Coeus Training
Effective Date : 01-SEP-2010	Begin Date : 01-SEP-2010
Execution Date : 31-DEC-2013	PreAward Date :

Project Documents				
Award: 022597-001 Acct#: 6777771 PI: Haskell, Edward ← <b>PI of Parent Award</b>				
Agreement				
DE-AR0000000	2014-06-26	Holden, Amy E	<a href="#">View</a>	
Amendment/Modification				
DE-AR0000000 Mod 0001	2014-06-26	Holden, Amy E	<a href="#">View</a>	
DE-AR0000000 Mod 0002	2014-06-26	Holden, Amy E	<a href="#">View</a>	
Institute Proposal: 14040972				
Reps and Certs				
Reps and Certs	2014-06-26	Holden, Amy E	<a href="#">View</a>	
Sponsor Proposal Acknowledgement				
Sponsor RFP				
Proposal: 00017553				
Narrative				
Budget Justification				
Other				
Other Institutional Attachment				
Award: 022597-002 Acct#: 6777772 PI: Haskell, Edward				
OSP-Sponsor Communication: Other				
Award: 022597-006 Acct#: 6777776 PI: Hensler, Judith ← <b>Different PI on Child</b>				
Agreement				
Task Order SOW	2014-06-26	Holden, Amy E	<a href="#">View</a>	
OSP-Sponsor Communication				
Change of effort - Hensler	2014-06-26	Holden, Amy E	<a href="#">View</a>	
Award: 022597-015 Acct#: 6777785 PI: Haskell, Edward				
Internal Approvals/Requests				
Fab Equipment	2014-06-26	Holden, Amy E	<a href="#">View</a>	

# Co-I My Awards: Project Documents

## Award Summary

- Co-I at parent level has no **Project Documents** link in left Navigation
- PI of child awards must use **Award Search** to access Project Documents

## Project Documents

- PI of child award accesses Project Documents associated only with that award

Logged in User is Co-I → User: Hensler, Judith

Current Locks

Coeus Home My Proposals **My Awards** My COI Inbox My ARRA Logout

**Award Search**

**Award Summary** >>

**My Award List**

**No Link to Project Documents**

Account No.: 6777771 (Restricted - No Postings Allowed) Award No.: 022597-001  
 Sponsor: DOE - Office of ARPA-E (000221) Activity Type: Organized Research  
 Sponsor Award No.: DE-AR0000000 Award Type: Cooperative Agreement  
 Prime Sponsor: Account Type: Regular  
 Title: Advanced Energy Research Lead Unit: 150001 - Center for Coeus Training

**Effective Date and Personnel**

Pre Award Effective Date:  
 Award Effective Date: 01-SEP-2010

Investigators: (PI) Haskell, Edward(150001)  
 → Hensler, Judith(391000)

Key Persons: Cleaver, Theodore  
 Mondello, Larry

**Schedules and Special Reviews**

Approved Equipment  Cost Sharing   
 Approved Subcontract  Indirect Cost   
 Approved Foreign Trip  Transfer Sponsor   
 Payment Schedule

Special Reviews: Status Protocol # Appr Date  
 No Special Reviews present

**Money And End Dates**

Award Number	Obligated Distributable	Anticipated Distributable	Obligation Effective Date	Obligation Expiration Date	Final Expiration Date
022597-001	\$0.00	\$0.00	01-Sep-2010	31-Dec-2013	31-Dec-2013

User: Hensler, Judith

Current Locks

Coeus Home My Proposals **My Awards** My COI Inbox My ARRA Logout

**Award Search**

**Award Summary**

**Key Person Maintenance**

**Project Documents** >>

**My Award List**

Account No.: 6777776 (Active) Award No.: 022597-006  
 Sponsor: DOE - Office of ARPA-E (000221) Activity Type: Organized Research  
 Sponsor Award No.: DE-AR0000000 Award Type: Cooperative Agreement  
 Prime Sponsor: Account Type: Regular  
 Title: Advanced Energy Research - Hensler Child Lead Unit: 391000 - Office of Sponsored Programs

Effective Date: 01-SEP-2010 Begin Date: 01-SEP-2010  
 Execution Date: 31-DEC-2013 PreAward Date:

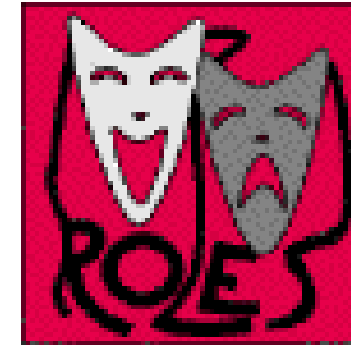
**Project Documents**

**Award: 022597-006 Acct#: 6777776 PI: Hensler, Judith** ← **PI of Child Award**

- Agreement**
  - Task Order SOW 2014-06-26 Holden, Amy E [View](#)
- OSP-Sponsor Communication**
  - Change of effort - Hensler 2014-06-26 Holden, Amy E [View](#)

# My Award Roles Integrated with Roles Database

- CoeusLite My Award authorizations will be **maintained by DLC Financial Primary Authorizers via the Roles Database**
- Document Roles enable viewing of attachments in Coeus Premium Award and Institute Proposal modules and via the new CoeusLite My Awards *Project Documents* interface



# My Awards Roles maintained in Roles Database

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## New Roles for Project Documents DLC Authorization

- View Shared Award Documents
- View Shared Institute Proposal Documents
- View Dev Proposal Attachments
- View All Shared Documents

## Existing Coeus Roles moving to Roles DB

- View Departments Awards
- View Key Person Maintenance
- Maintain Key Person





# My Award Roles Integrated with Roles Database

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- Authorizations granted at Unit/Profit Center level (e.g. PC391000 – OSP)
  - *NOTE: Cost Object level role assignment is NOT compatible with Coeus*
- “View Departments Awards” populates users’ My Awards lists with all -001 level active awards for the Profit Centers in which the roles is assigned
  - Without it, My Awards will not display list of -001 awards; users must use Award Search for access
  - Should be assigned along with Project Document and Key Person Maintenance roles



# Coeus Authorizations – where to assign them?

Roles Database – DLC Maintained Roles	Coeus Maintained Roles (via Webform request)
View Departments Awards	View Award & View Institute Proposal
View Key Person Maintenance	Proposal Creator*
Maintain Key Person	View/Maintain All Dev Proposals*
View Shared Award Documents	View/Maintain Award Budget for RAFT**
View Shared Institute Proposal Documents	
View Dev Proposal Attachments	
View All Shared Documents	

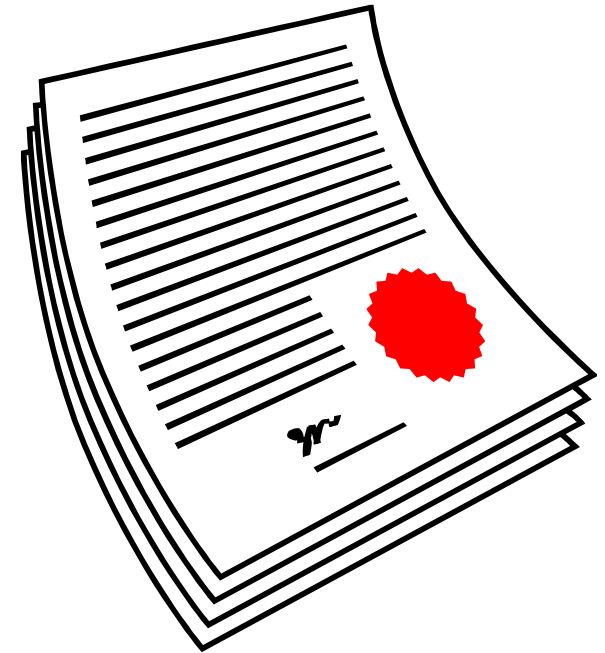
\* Requires request come from DLC AO/FO  
\*\* Requires Award Budget training completion

# 1. View Shared Award Documents (New Role)

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## Will allow user to access

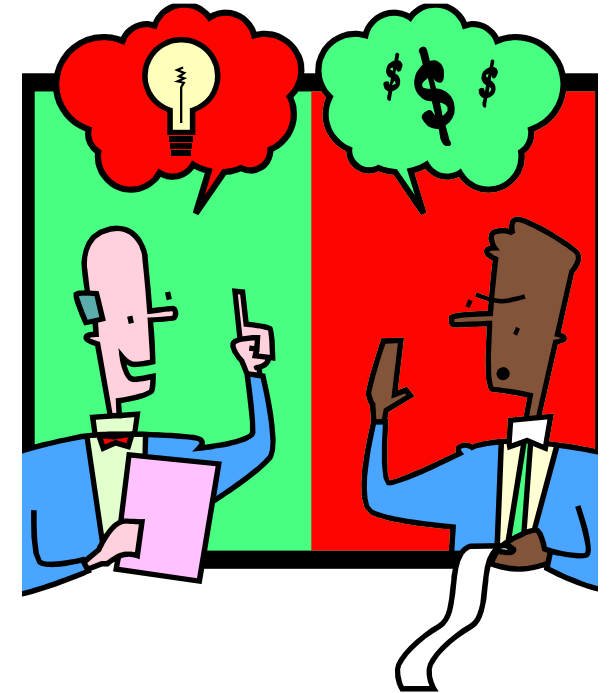
- all shared Award Documents at the -001 parent plus all shared Award Documents at child award levels when accessing via the -001 level award
- only Shared Award Documents on a given child account when accessing via child award record (Award Search)
- only Shared Award documents if no additional View Documents role is given for other modules (e.g. no Institute Proposal documents will display)



## 2. View Shared Institute Proposal Documents (New Role)

### Will allow user to access

- For -001 parent award - all Shared Institute Proposal attachments on IPs funded to the -001 parent or any of its child awards
- For child award - only Shared Institute Proposal attachments on IPs that are funded to that child account/award



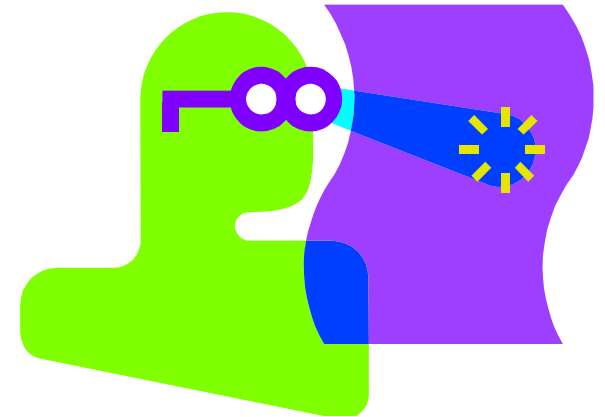


### 3. View Dev Proposal Attachments (New Role)

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#### Will allow user to access

- All Proposal Dev Attachments on Dev Proposals linked to Institute Proposals funded to the -001 award parent, AND
- All Proposal Dev Attachments on Dev Proposals linked to the Institute proposals funded to child awards in the structure
- For child award records: all Proposal Dev Attachments on Dev Proposals linked to IP's funded to that child award



Note: this role does not give access in Coeus Lite or Premium to the Proposal Development Module

## 4. View All Shared Documents (New Role)

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This role combines the rights of all three View Shared Documents roles, and can be used by DLC Primary Authorizers to grant all three roles to a user without having to individually select each one

- View Shared Award Documents
- View Shared Institute Proposal Documents
- View Dev Proposal Attachments



# Document Types and Naming

- ❖ “Award Attachment Types” & “Institute Proposal Attachment Types” tables provide guidance on which sort of project documents are uploaded where and what info the naming conventions convey

Award Attachment Types		
<b><u>DOCUMENTS NOT UPLOADED TO COEUS:</u></b>		
COEUS input forms		
COEUS COI hold releases and other hold releases		
Email communication within OSP (CA/ACA/data team) regarding COEUS changes		
SAP Summary Statements and Detailed Transaction Reports		
Unsigned COEUS NOAs or Change Notices		
<input checked="" type="checkbox"/> Shared <input type="checkbox"/> Non-Shared (OSP only)		
DOCUMENT TYPE	DESCRIPTION <sup>2</sup> [Required field. Only ~60 characters are visible. Recommended text below. More may be included if space permitted.]	What is it?
Agreement	For Fed awards: [full award #. <i>Example: 1R01GM12345-01]</i> For non-fed awards: [agreement type - <i>e.g., SRA; Subaward; Grant; Master; Consortium; No Cost Collaboration;</i>	Executed agreement; Intended for both funded and unfunded (x-file) agreements. Research Project Plans and Task Orders should be attached to child accounts. Subaward indicates a subaward to MIT from another entity.

# My Awards Project Documents Demo

The screenshot displays the CoeusLite web application interface. At the top right, the user is identified as 'User: Haskell, Edward'. Below this is a 'Current Locks' section. A navigation bar contains tabs for 'Coeus Home', 'My Proposals', 'My Awards', 'My COI', 'Inbox', 'My ARRA', and 'Logout'. The left sidebar menu is divided into two sections: 'All Coeus Lite Users' (with links for Grants.Gov, Training and Reference Materials, CoeusLite Proposal Preparation Manual, and Award Budget) and 'For Coeus Premium Users' (with links for Launch Coeus Premium, Change Password, Premium Proposal Preparation Manual, and Help). The main content area features a 'Welcome to CoeusLite' heading and a section titled 'Primary Features of Coeus Lite include:'. This section lists four features: 'My Proposals' (for preparing and submitting grant applications), 'My Awards' (for reviewing award information and maintaining key persons), 'My COI Disclosures' (for submitting financial conflict of interest disclosures), and 'My ARRA' (for reviewing data and completing reports for the Recovery Act). To the right of the main content is a 'Coeus Mission' section with a quote: 'To create, maintain and support the most robust electronic solution to manage all components of sponsored projects from proposal development through award closeout while fostering best practices by joining innovative technology with the knowledge base of a national consortium of research stakeholders.' At the bottom of the main content area, there is a thank-you message: 'Thank you for using Coeus! Please remember to send any questions or comments to coeus-help@mit.edu.' The footer of the page includes '© 2006, MIT' on the left and 'Cocuslite Version 4.5.1.2' on the right.

# Resources

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- ❖ Coeus Electronic Document Storage webpage – OSP Website: Contract and Grants Administration: Award Set Up: Coeus Electronic Document Storage (EDS)
  - ❖ Basic info and links to Quick Cards, Document Types and Naming Conventions guidance, etc.
  - ❖ <http://osp.mit.edu/grant-and-contract-administration/setting-up-an-award/coeus-electronic-document-storage-eds>
- ❖ Quick Reference Cards, etc. on Coeus Help & Training Website
  - ❖ Separate Quick Cards for DLC admin users, PI's & Co-I's, DLC Primary Authorizers, Premium Users
  - ❖ <http://osp.mit.edu/coeus/user-guides/quick-reference-cards>
- ❖ For Help – email [Coeus-help@mit.edu](mailto:Coeus-help@mit.edu)

UPCOMING OSP FORUM

**UNIFORM GUIDANCE:  
What We Know So Far**

**August 14, 2014**