Want to participate in this presentation?  
Text sharonb to 37607

To answer questions during the presentation, you will type a, b, or c, and then send.

Text sharonb to 37607

TIPS AND TRICKS in COEUS Reporting for RSAs
Once upon a time ... there lived two very busy RSAs.

Dawn had worked at JHU for a very long time.

Dawn had said, "I could do some of this job in my sleep!"

Dawn had worked for a very long time.

Dawn had said, "I could do some of this job in my sleep!"
Dana was a new hire, still in his first 120 days.

Dawn and Dana both worked for Dr. Michael Miller.
One day, Dr. Miller thought,

I need to get the Current and Pending portion of my CV updated for that progress report and for the budget meeting with my Chair.

The very same day,

Can you two draft/check my CV and Biosketch for the progress report and my meeting with the Chair?

Finally!

Dude.

Sure!
Which COEUS tool do you use for Other Support (Current and Pending)?

| A | 700 Investigator History Report |
| B | 702e Other Support Tool         |
| C | Both                           |
| D | Neither                        |

Text sharonb to 37607

To answer questions during the presentation, you will type a, b, or c, and click send.
Top Five COEUS Reports – Jan-Dec 2016

Dana asked Dawn,

700 Investigator History?
702e Other Support Tool?
What's the Difference?

I printed some off for you to compare.
### Investigator History Report

<table>
<thead>
<tr>
<th>Inst Prop #</th>
<th>Grant #</th>
<th>Sponsor Award #</th>
<th>Activity Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Direct</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI - Miller, Michael</td>
<td>13468</td>
<td>NIBB</td>
<td>Organized Research</td>
<td>09/30/2016</td>
<td>07/31/2017</td>
<td>$400,000.00</td>
<td>$750,640.00</td>
</tr>
<tr>
<td>PI - Miller, Michael</td>
<td>110899-0716</td>
<td>KNC</td>
<td>Organized Research</td>
<td>07/01/2015</td>
<td>06/30/2016</td>
<td>$47,100.00</td>
<td>$76,590.00</td>
</tr>
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</table>

**Pending**

<table>
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</tbody>
</table>

**Not Funded**

<table>
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<tr>
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<th>Sponsor Award #</th>
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Before we open COEUS report 702e Other Support, let's talk browsers!! Different browsers treat the .xml file differently.
Tip #1: Set your default browser via the Start button.

1. Click the Start button.
2. Click Control Panel.
3. Click Default Programs.

4. Click Set your default programs.

5. Click to select a browser; for example, Firefox.
6. Click Set this program as default.
7. Click OK.
8. Click ✕ to close window.
9. Restart your computer or log back into COEUS to apply change.
Tip #2: Set your default browser via the browser.

With IE open,
1. Click the 🚀 gear icon.
2. Click Internet Options.
3. Click Programs tab.
4. Click Make Default.
5. Click OK.
6. Restart computer or log out and log back into COEUS for COEUS to use the new default.

Tip #3: Set your default browser via the browser.

With Mozilla/Firefox open,
1. Click the ☰ Open menu icon.
2. Click ☰ Options.
3. Click Make Default.
4. Click x to close the Options tab.
5. Restart computer or log out and log back into COEUS for COEUS to use the new default.
Tip #4: Set your default browser via the browser.

With Chrome open,

1. Click the Open menu icon.
2. Click Settings.
3. Click Make Default.
4. Click x to close the Options tab.
5. Restart computer or log out and log back into COEUS for COEUS to use the new default.
1. Click Departmental.
2. Select Personnel.
3. Enter the Last Name and First Name fields. Include an * asterisk after the name.
4. Click Find.

5. Click the PI.
6. Click Report.
7. Click 702e Other Support Tool.
8. Enter the date. Use a date nearest the deadline date for the progress report, for example.
9. Click Print.
10. Click Open with.
11. Click OK.
12. In the Excel file, click File.

13. Click Save As.
14. Click Computer.
15. Click Desktop (for example).

17. Click Save.
1. Click **Departmental**.
2. Select **Personnel** ...

3. Enter the Last Name and First Name fields. Include an * asterisk after the name.
4. Click **Find**.

5. Click the **PI**,
6. Click **Report**.
7. Click **702e Other Support Tool**.

8. Enter the date. Use a date nearest the deadline date for the progress report, for example.
9. Click **Print**.
The download appears at the bottom of a Chrome window.

10. Double-click the file, for example, CoeusDocument.xml.
11. In Excel, click File.

12. Click Save As.
13. Click Computer.
14. Click Desktop (for example).

15. Name file.
16. Click Save.
1. Click **Departmental**.
2. Select **Personnel** ... 
3. Enter the Last Name and First Name fields. Include an * asterisk after the name.
4. Click **Find**.
5. Click the PI,
6. Click **Report**.
7. Click **702e Other Support Tool**.
8. Enter the date. Use a date nearest the deadline date for the progress report, for example.
9. Click **Print**.
10. Click the gear icon.
11. Click File.
12. Click Save as ....

13. [optional] Rename the file from the default name of CoeusDocument.xml
14. Navigate to where you want to save the file; for example, Desktop.
15. Click Save.
Which step needed for the 702e causes the most calls to the Help Desk?

A Click Report (wrong) instead of Departmental (right)

B Forget to edit the date.

C Where did the Excel file go?
Tip #5: Date 12/31/9999 will yield zip! Change the date! Use the deadline when the report is due.

The tool searches Coeus and SAP data for proposals where the:

- TI has effort proposed
  AND
- Proposal is funded or pending on the “as of” date
Part 1 - Top Section
TI is PI or Co-I on
1. [active] SAP Grant Master Data awarded
2. [pending] Coeus Inst. Proposals

Part 2 - Bottom Section
TI is named on another PI's [funded] Inst. Proposal and [active] GM Grant award.

Returns records where TI is a Co-I or Key Person and excludes those records found in Part 1.

No pendings shown in Part 2.
So, it looks like the top section is Funded AND Pending?

And the bottom section is only Funded?

And they don’t repeat the same data?

Exactly!

How do you know what all this data means?
Tip #6: Use ORIS Reports User Guide! It’s currently 57 pages, but I use Ctrl+F to search for 702e. There’s a nice table on page 43 that explains all the columns and data.

~ page 43

Thanks for that! I can show you a tip on how to make this easier to read in Excel.
1. Select the column header cells you want to angle.

2. Click Orientation button.


4. Type 75 in the Degree field.

5. Click OK.

So much easier to read!
Let's talk more about the data.

Proposal Status:
‘Funded’ - proposal is awarded and currently active in SAP.
‘Pending’ - proposal is pending and considered to be still under review by the sponsor.
Project Start Date and Project End Date

Status ‘Funded’ - Project Start Date and Project End Date are pulled from GM Grant Master Data.

Project Start Date and Project End Date

Status ‘Pending’ - Project Start Date and Project End Date proposed in the Proposal submitted to sponsor. The initial IP date is shown if multiple proposals were submitted.
**Period Direct Cost** - Status 'Funded' - Is the Direct Award Amount for that period from the Award Year Breakdown tab of the GMGRANTD.

**Total Proj Direct Cost** - Status 'Funded' - Is the sum of Past, Current and Future years' Direct Award Amounts from the Award Year Breakdown tab of the GMGRANTD.

**IP (Proposed) Effort %**

This is always the Effort proposed in the Original Institute Proposal (IP) record for the Target Investigator.
PI_Name/Person Name*

Part 1 - 'IP_PI' is the PI on the displayed record, both SAP Award and Coeus IP.

* This is the only column in which Part 1 and 2 have different headings/purposes.

Part 2 - 'Person Name' is the Target Investigator.

Award ID

If Status 'Funded' - Award ID assigned by sponsor if noted in GM Grant.

If Status 'Pending' - Always 'NA', no data returned.
Can you guess why I like the Title in 702e?

Oh yeah!! It's not **ALL CAPS** and it's the **complete** title!!
Dates: COEUS versus SAP

What’s up with Active status? It’s different in COEUS reports than in SAP/BW?

Good question, Dana! Coeus Award has a slightly more stringent definition of awards that are ‘active’, then does SAP!

Let’s talk status for IPs!

<table>
<thead>
<tr>
<th>IP Status</th>
<th>SAP Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Pending</td>
</tr>
<tr>
<td>Funded</td>
<td>Awarded-Active</td>
</tr>
<tr>
<td></td>
<td>Terminated</td>
</tr>
<tr>
<td>Not Funded</td>
<td>Not Funded</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Withdrawn</td>
</tr>
<tr>
<td>Void</td>
<td></td>
</tr>
</tbody>
</table>
### Active -- SAP versus COEUS

<table>
<thead>
<tr>
<th>SAP Active</th>
<th>Is Lifecycle status Award?</th>
<th>AND</th>
<th>Is User Status Approved Award?</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>COEUS Active</td>
<td>Is Lifecycle status Award?</td>
<td>AND</td>
<td>Is User Status Approved Award?</td>
<td>AND</td>
</tr>
</tbody>
</table>

**Master Data Index for Grant**

<table>
<thead>
<tr>
<th>Grant</th>
<th>Lifecycle Status</th>
<th>User Status</th>
<th>User Status Desc</th>
<th>Valid To Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>IS616</td>
<td>Award</td>
<td>E0003</td>
<td>Approved Award</td>
<td>01/31/2018</td>
<td></td>
</tr>
</tbody>
</table>

### Terminated -- SAP versus COEUS

<table>
<thead>
<tr>
<th>SAP Terminated</th>
<th>Dept and SPSS agree project is over.</th>
<th>+</th>
<th>Revenue and Expenses are equal</th>
<th>+</th>
<th>No outstanding encumbrances and no GR/IR imbalances</th>
<th>+</th>
<th>SPSS will move an award into Lifecycle: Closing, User Status: Temporarily Closed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>COEUS Terminated</td>
<td>Is Lifecycle status Award?</td>
<td>+</td>
<td>Is User Status Approved Award?</td>
<td>+</td>
<td>Is today's date &gt; Project End Date?</td>
<td></td>
<td></td>
</tr>
</tbody>
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**Master Data Index for Grant**

<table>
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<tr>
<th>Grant</th>
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<th>User Status Desc</th>
<th>Valid To Date</th>
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</tr>
</thead>
<tbody>
<tr>
<td>IS617</td>
<td>Closing</td>
<td>E0008</td>
<td>Temporarily Closed</td>
<td>03/31/2012</td>
<td>03/31/2010</td>
</tr>
</tbody>
</table>

- **SAP**
  - Active
  - Terminated: Dept and SPSS agree project is over.
  - Revenue and Expenses are equal
  - No outstanding encumbrances and no GR/IR imbalances
  - SPSS will move an award into Lifecycle: Closing, User Status: Temporarily Closed.

- **COEUS**
  - Active
  - Terminated: Is Lifecycle status Award?
  - Is User Status Approved Award?
  - Is today's date > Project End Date?
In COEUS, 'Funded' status converts to 'Terminated' status (and moves off the 702e report) the day AFTER the Project End Date!

Pop Quiz: When would that first funded line drop off this report?

![Image](image1.png)

In Coeus, 'Pending' status converts to 'Not Funded' status 365 days after the project start date. Not Funded does not appear on 702e.

![Image](image2.png)
When would the first **Pending** auto-convert in COEUS to **Not Funded** and not appear in this report?

4/1/2017

Can't we get it taken off this report before then?

Yes!

I will tell you how soon.

---

**Dates: A little summary**

Pending Project Start Date + 365 days → Not Funded
- no longer shows on 700 or 702e
- shows as Not Funded on History of An Investigator, Other Support

Funded Project End Date + 1 days → Terminated
- no longer shows on 702e
- Shows as Terminated on 700
- may continue to show on BW reports as Active until SPSS and Department finish all close-out requirements.
Making Corrections …

How come this grant is still listed as Pending? It didn’t make the pay grade.

Thanks for letting me know. I will e-mail ORA to get that corrected.

Finally!

The very same day,

♪ Oh Dana! ♪
♪♪ Time to learn a new skill!

Bring it!
Where to report data errors in ORIS Reports *(Pending)*

Report errors found in **Pending Projects** (Institute Proposals) to your Office of Research Administration, including:

- Wrong Status
  - Pending to Funded
  - Pending to Not Funded

- Wrong IPN associated with an award

- Wrong Co-Investigators

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How to report data errors in **Pending Projects**

*How about this?*

*Perfect! Thanks!*
Where to report data errors in ORIS Reports (Awarded)

Report errors in **Awarded Project** data to Sponsored Projects Shared Services, including:

- **Wrong award amounts** - Direct, Indirect, Total Costs
  - Direct Costs
  - Indirect Cost
  - Total Costs

- **Wrong award dates**
  - Project State Date
  - Project End Date

How to report data errors in **Awarded** Projects

OK?

Yep!

---

Dear Research Accountant:

I am writing to inform you of a possible error in Award Master Date for Grant#12345. According to the NOA, the project end date should be 3/31/2017 instead of 3/30/2017.

Please let me know when you have updated the record or if you have any questions regarding this request.

Sincerely,
Is there some way that I can be pro-active with these updates?

Sure! I can show you how to run the 300e Pending Proposals Excel Data File. You can run this report at the various levels.
Tip #8: Running the 300e Pending Proposals Report

1. Click Admin.
2. Click Unit Hierarchy ...
3. Click Search.
4. Under Unit Number, enter the first 8 digits of the cost center, followed by an asterisk (*).
5. Press Enter on your keyboard.

6. Click OK.
7. Click Report.
8. Click 300e - Pending Proposals Excel Data File.
9. Click Print.
10. Click OK.

And save as you normally do.
Do you want me to show you how to add auto-fit columns to your quick access toolbar?

Sure! Do you know how many clicks that will save me??

Tip #9: Adding Autofit Columns to the Quick Access Toolbar

1. Click the dropdown arrow under Format.
2. Right-click AutoFit Column Width.
3. Click Add to Quick Access Toolbar.

Clicking the newly added dot on the Quick Access Toolbar will auto-fit whatever column you have selected. Hovering over the dot will say what it is.
Later that day …

Dawn and Dana. The CV looks great!

Our pleasure!

I forgot that I even had effort on some of those awards … which reminds me, I bet I owe a progress report to Dr. Einstein …

Finally!

Never a dull moment.

Text leave to exit the txt poll.