

Main Toolbar

The Coeus Main toolbar, located below the menu bar, is consistent in every module of Coeus.



Icon	Action	Icon	Action
	Maintain Inbox - Inbox contains messages regarding routing and approval or notifications.		Maintain Users - Opens User Maintenance, where you can see who has access to Coeus.
	Maintain Awards - This module is not used.		Maintain Unit Hierarchy - Opens the Unit Hierarchy, where you can browse the complete list of departments.
	Maintain Institute Proposals - This module is not used.		Protocol - This module is not used.
	Maintain Proposal Development- Opens the Proposal Development module.		Schedule - This module is not used.
	Maintain Rolodex – Stores contact information for external people.		Committee - This module is not used.
	Maintain Sponsor - This module is not used.		Protocol Submission - This module is not used.
	Maintain Subcontracts - This module is not used.		Cascade View – allows you to cascade multiple windows.
	Maintain Negotiations - This module is not used.		Tile Horizontal View - allows you to horizontally tile multiple windows.
	Maintain Business Rules - Opens Business Rules, which are used to define default paths for routing and approval.		Tile Vertical View - allows you to vertically tile multiple windows.
	Maintain Maps - Opens Map Maintenance, which is also used for routing and approval.		Layer View – allows you to layer multiple windows.
	Maintain Personnel - Opens Person Maintenance, where you can see who is in the system.		Exit – exits you from Coeus.

Second Row Function Icons

Within each module you will find a second row toolbar that contains icons that will perform pertinent functions within a given module. Below is a description of the second row icons for the modules in use.

User Maintenance Icons:



Icon	Action	Icon	Action
	Add a new user – add a user to the system.		Save – saves entered data.
	User details – view the roles assigned to a user.		Close – closes the user maintenance module.
	Role Rights – displays what the role allows you to do.		Create Role – allows the creation of a new type of role. This functionality is used by ORIS.
	Reset Password – allows administrator to reset password		Modify Role – allows adjustments to the parameters of an existing role. This functionality is used by ORIS.
	Search for Users – searches for users in the system.		

Personnel Maintenance Icons:



Icon	Action	Icon	Action
	Add Module -		Move module down one row
	Delete Module -		Upload Attachment -
	Display person details – displays information for personnel that may be associated with the proposal. This includes degree information, Organizational, Personal, Contact Information, and other Miscellaneous information.		Save – saves entered data.
	Show educational qualifications of the selected person		Close – closes the person window.
	Move module up one row		

Rolodex Maintenance Icons:



Icon	Action	Icon	Action
	Add a new Rolodex entry		System Administrator Only
	Edit a Rolodex entry		Sort the Rolodex entry in the displayed list
	Display Rolodex entry in view-only mode		Search for a Rolodex entry
	Delete a Rolodex Entry		Save the Rolodex data to a spreadsheet, text file, or database file
	Copy a Rolodex Entry to create a new one		Close the Rolodex window



















Proposal Development Search Icons:



Icon	Action	Icon	Action
	Add a new proposal – start a new proposal record.		Medusa - This is not used.
	Modify selected proposal – edit an existing proposal.		Sort proposals - Use this to sort the results list.
	Display selected proposal – opens the selected proposal in display mode.		Search for proposal - Opens the search box for the proposal development module.
	Copy a Proposal – makes a new copy of the selected proposal.		Save as - Use this to export the results list to Excel.
	Notepad - Opens the notepad for the selected proposal, where you can add or view any general comments on that proposal.		Close - Closes the Proposal Development list window.

Proposal Detail Module Icons:



Icon	Action	Icon	Action
	Next Proposal – Displays the next proposal in progress or waiting for approvals for the same investigator. Available if you are in DISPLAY mode and have multiple proposal development records in your Proposal Development search results list.		Proposal Roles Maintenance - Opens the Proposal Roles window, where you can specify who has access to view or change this proposal.
	Previous Proposal – Displays the previous proposal in progress or waiting for approvals for the same investigator. Available if you are in DISPLAY mode and have multiple proposal development records in your Proposal Development search results list.		Proposal Abstracts - Opens the abstracts window, where you can add text descriptions for a variety of topics.
	Approve Proposal – Sends the proposal to the next level of the approval mapping. Available only to “Approvers”.		Proposal Persons - Opens a list of everyone on the proposal: investigators and key personnel.
	Submit Proposal for Approval - Initiates routing and approval.		Notepad - Opens the notepad for the selected proposal, where you can add or view any general comments on that proposal.
	Select Approval Map - Allows you to choose a direct routing map to apply.		Medusa - This is not used.
	Send Proposal Notification - Sends a message to a specified user, which they will receive in their Coeus inbox.		Print – prints proposal on sponsored forms (if available).
	Proposal Narrative -Opens the narrative section, where you can view and upload any electronic files relating to the proposal.		Save – saves proposal.
	Proposal Budget - Opens the budget selection window, where you can create or view budgets for this proposal.		Send Mail Notification -
	Yes No Questions - Opens the Yes/No Questions box.		Close – closes the proposal details window.

Narrative Module Icons:



Icon	Action	Icon	Action
	Add module – add a new module to this proposal.		Move module down one row
	Modify module – edit an existing module in this proposal.		Upload Attachment -
	Delete module – deletes a module from the proposal.		Save – saves narratives.
	Move module up one row		Close – closes the proposal narrative window.







Proposal Budget Module Icons:



Icon	Action	Icon	Action
	Add Line Item - Creates a new blank line item in the selected period.		Maintain Rates for Proposal -Opens the rate maintenance window where you can fine-tune the rates applied for the budget.
	Modify Line Item Details - Opens a detail window for the selected line item for modifications.		Budget Persons -Opens the list of available people on this budget. This list will be automatically populated for you on new budgets based on the people in the investigator and key persons tab on the proposal.
	Delete Line Item - Deletes the selected line item in the selected period.		Customize View - Allows you to switch the way line item details are displayed in the budget window.
	Personnel Budget for Line Item - Opens the personnel budget info screen for the selected line item, if the line item is an S&W cost element.		Save - Saves the budget.
	Calculate Budget - Applies all automated calculations and refreshes the budget window		Close - Closes the budget window.
	Generate All Periods - Takes your period 1 details and applies across outlying periods, applying all necessary inflation rate calculations. This cannot be undone once you save the budget.		





Coeus Inbox Icons:



Icon	Action	Icon	Action
	Delete the selected message – deletes the highlighted notification.		Modify the selected proposal – opens the selected proposal in edit mode.
	Change the status – moves the notification from unresolved to resolved and vice versa.		Display the selected proposal – opens the selected proposal in display mode.
	Refresh the view – refreshes the screen.		Close – closes the inbox.




Notepad Icons:



Icon	Action	Icon	Action
	Add new row – adds a new line for comments.		Save – saves the comments to the proposal.
	Send Proposal Notification - Sends a message to a specified user, which they will receive in their Coeus inbox.		Close – closes the notepad.

Approve Proposal:



Icon	Action	Icon	Action
	Next Proposal – move to next proposal.		Approve Proposal - Opens the proposal approval window. We will not use this until we are using routing and approval in Coeus.
	Previous Proposal – move to previous proposal.		