

Coeus Retirement December 2023 Update

Last updated: 12/18/2023

The Coeus production application and database have been retired as of 12/6/2023. The Coeus application and database are no longer available. RIP Coeus!

Need Coeus attachments?

All Coeus attachments related to a PS award that have not yet met the University or sponsor's record retention are available using the Attachments link on the Sponsored Award Summary report and the Subaward Detail Report in the Prime Financial Information Warehouse. After clicking on the Attachments link, the Coeus attachments appear in up to 4 headers in the Document Viewer, one header for each Coeus module where attachments had been uploaded: Coeus PD Attachment, Coeus IP Attachment, Coeus Award Attachment, and Coeus Subaward Attachment. All attachments within each of those headers is labeled the same way and with the same date, 6/17/2023, which is the date the attachments were migrated from Coeus to PS Grants. If there are many Coeus attachments related to a PS award and it's difficult to find a specific attachment, please reach out to the ERA Team at erasupport@princeton.edu and we'll help locate it.

Need Coeus data?

The **Tableau Sponsored Research Dashboard** has basic demographic data for Coeus **awards from FY12-14** and submitted Coeus **proposals from FY12 through part of FY21** (specifically through mid-August 2020, which is when Coeus PD was frozen in preparation for Princeton ERA's go-live on 8/31/2020). Raw data can be downloaded from Tableau.

Inside the "ORPA Princeton ERA – Reports" Information Warehouse (IW) folder, there is a new "**Coeus Retirement Reports**" subfolder in the IW, which contains demographic data **for all years of Coeus at Princeton**. Run these reports as "Run Excel Data" (instead of "Run Excel") and then use the filters in the resulting Excel spreadsheet. Subfolders are:

- **Crosswalk reports:**
 - A Medusa crosswalk that links all Coeus Proposal Development (PD), Institute Proposal (IP), award, and subaward IDs together, intended to mimic the behavior of the Medusa button in the Coeus application.
 - A proposal hierarchy crosswalk that displays the parent proposal number and all child numbers associated with that parent. If the proposal was awarded and the award is in PS Grants, the PS Award ID is also displayed.
- **Demographic Data Reports**
 - Returns basic demographic data, similar to searching each module in the Coeus application, for the following: Award, IP, IRB, Opportunity ID, PD, S2S, Sponsor, Subaward
 - For award, IP, PD, IRB specifically: unlike the search results in the Coeus application, the report also displays all personnel on the Coeus Investigator and Key Person tabs as follows:

Person Type	Lead PI Flag	Project Role	Notes
Lead Investigator	Y	n/a	This person was listed on the Coeus Investigator tab with the "lead PI" box checked.
Investigator	N	n/a	This person was listed on the Coeus Investigator tab with the "lead PI" box unchecked.
Key Person	n/a	Filled in	This person was listed on the Coeus Key Person tab with the project role specified.
Key Person	n/a	n/a	This is an artifact of the IW reporting. This proposal was in progress and no investigators nor key people were specified in Coeus, yet somehow the report is returning the words "Key Person"

- A note for subaward personnel: in Coeus application, the search was on the Requisitioner. Frequently, the Requisitioner listed in the Coeus subaward was the dept level grants manager, who had been delegated authority to approve the subaward invoices, or the subaward requisitioner was an award co-PI or key person. Also, for a few years, Princeton used the Coeus subawards module for tracking PSPAs and CAs, using the same Coeus account number and Coeus award ID for the PSPAs and CAs. The subaward personnel report in the IW returns the requisitioner in one column and also returns all people listed on the Investigator and Key Persons tabs in the Coeus award module, on all levels of the award hierarchy, where a level of the award hierarchy was listed as the funding source for that subaward.
- A note for obligated and anticipated column definitions on the Coeus demographic data Award report:
 - Obligated Amount is the obligated amount for that level of the award hierarchy. If this is the -001 level, this is the obligated amount for the entire award.
 - Anticipated Total Amount is the anticipated amount for that level of the award hierarchy. If this is the -001 level, this is the anticipated amount for the entire award.
 - Obligated “Dist” Amount is the obligated distributable amount for that level of the hierarchy—the amount of money obligated for that level.
 - Anticipated “Dist” Amount is the anticipated distributable amount for that level of the hierarchy—the amount of money anticipated for that level.
- **Personnel reports**
 - This lists all personnel listed on the Coeus record. See the table and notes above for more info.
- **Record Retention reports**
 - This lists all Coeus IDs that potentially had attachments migrated to PS Grants and therefore appear on the Attachments link on the Sponsored Award Summary report in the Sponsored Research tab of the Prime Information Warehouse because the Coeus record was associated with a PS award that had not met the sponsor’s or University’s record retention. However, this report does not give an indication that there were any attachments uploaded to Coeus to be migrated; it is just a listing of IDs that, if they had Coeus attachments, those attachments would have been migrated to PS Grants.

The old **“Coeus Reports” folder** is now inside of the **“ORPA Princeton ERA – Reports”** folder and contains two Institute Proposal reports **for all years of Coeus at Princeton**: **“Proposals by Action Date”** and **“Proposals by Submit Date”**. Coeus Institute Proposals had the concept of sequences, and dates associated with sequences.

- Action Date is the max sequence date (latest date) when something was changed in the record. For awarded proposals, this is usually but not always the date when the award was set up in Coeus or, after Prime go-live, in PS Grants. However, sometimes the record was updated for other reasons after it was awarded, which changed the Action Date, so Action Date cannot be used as the absolute date the proposal was set up as an award in Coeus or PS.
- The Submit Date is the date when the ORPA GCA approved the Proposal Development proposal which automatically generated the Coeus Institute Proposal record. If you are looking for proposals submitted in a timeframe, the Submit Date report is the report to run. In the report results, any columns with the “Original” label are from Institute Proposal sequence 1, and columns without that label are from the max sequence.
- At the time of Princeton ERA launch, ~1200 Coeus IPs were in pending status. When ORPA received notification that a pending Coeus IP was declined, ORPA updated the Coeus IP status from pending to declined. Every quarter, OIT marked Coeus pending proposals as declined if it had been 2 or more years since the last Coeus Action Date. On 8/18/2022, the remaining Coeus pending IP proposals were assumed to not be funded by the sponsor and were declined. In October 2022, one of those “declined” Coeus IP proposals was funded by the sponsor, so the IP status was changed back to pending so it could be awarded to PS and became the final Coeus proposal to be Funded status.

Appendix: A brief history of Coeus at Princeton University

Coeus was the software suite used by the University to develop and track externally sponsored research proposals and awards. The suite was developed at MIT and used by ~50 schools around the country in its heyday. Coeus went live at Princeton on 6/1/2002. Coeus was composed of many modules, with features added over the years:

- **Proposal Development (PD):**
 - Department administrators built proposals in the Coeus Proposal Development (PD) module with its own tracking ID.
 - Some proposals used the proposal hierarchy concept, where multiple PD IDs were linked together as children, with another PD ID designated as the “parent” PD which summed together all child budgets. There were many reasons proposal hierarchies were created such as different OH rates in one proposal (e.g. on, off, 0% fabricated equipment), or proposals with multiple researchers who each wanted to see their budgets separately.
 - PD also used the system-to-system (s2s) concept where proposals submitted to federal sponsors like NIH, DOD, and DOE could be entered by department administrators in Coeus and then transmitted to Grants.gov without the dept administrator needing to complete the Grants.gov forms separately. Use of s2s was not mandatory and declined after NIH released their ASSIST system.
 - From May 2015 until Princeton ERA go-live, non-funded agreements were stored in Coeus.
 - In mid-August 2020, the Coeus PD module was frozen in anticipation of Princeton ERA go-live on 8/31/2020.
- **Institute Proposal (IP)**
 - Once the PD proposal was submitted and fully approved by ORPA, Coeus automatically generated an Institute Proposal (IP) with another tracking ID.
 - Any changes to the original submitted and approved PD resulted in a new PD ID linked to the same IP ID.
 - The Coeus IP module was frozen in October 2022.
- **Awards and subawards**
 - Once funded, proposal information was generated into an award in the Award module, with budgets being added in the award budget module. Awards could have just one account number or could be divided into many accounts using the hierarchy system, from the parent to the great-grandchild level.
 - Related subawards were maintained in the Subaward module. The Subaward module was also used for a time to track PSPAs and CAs.
 - Up until Prime go-live on 7/1/2014, award and subaward information was also housed in Coeus. The award information fed to the old PS Financials version 8.4. Data in the Coeus award and subaward modules was frozen in Coeus as of mid-June 2014. From Prime go-live on 7/1/2014 until October 2022, awarded Coeus proposals were interfaced to PS Grants 9.2 for setup and maintenance. Subaward information is housed directly in PeopleSoft (PS) Financials since 7/1/2014.
- **IRB**
 - The IRB module was used by the back office only.
 - Human subject protocols were tracked in the IRB module.
 - The Coeus IRB module was frozen in the summer of 2017. Since July 2017, IRB protocols are housed in the InfoEd eRIA system.
- **Responsible conduct in research (RCR)**
 - RCR information for those who needed to take the RCR training because they were charged to an award with the RCR requirement, and those who took the training regardless of if they were charged or not, was tracked in the Coeus training table until Princeton ERA go-live in August 2020.
- **Additional notes**
 - Princeton never used the Coeus Negotiations nor IACUC modules.
 - The final version of Princeton at Coeus, version 4.5.1.P2, was installed during the final April 2014 upgrade.
 - No Coeus proposals were converted to Princeton ERA at Princeton ERA go-live. Active, unexpired non-funded agreements were converted to the Princeton ERA Agreements module.