CoeusLite - Approving Proposals Guide

If you are responsible for approving proposals in Proposal Development, this guide will provide a brief list of steps on how to approve or reject proposals using CoeusLite.

Email

1. If you are an approver and have email notifications turned on, you will receive an email from “Coeus Automatic Notification” with a subject line that resembles “Proposal ######## … is waiting for approval…“.

2. Click the link in the email to automatically open up the proposal with CoeusLite in your default Web browser.

Approve a Proposal in CoeusLite

1. After clicking the link in the notification email, log in using your Directory ID and password.

NOTE: CoeusLite may be accessed via the following link at any time as well: https://apps.umd.edu/coeus/userAuthAction.do
2. The proposal details page will be displayed and show summarized information on the proposal.

3. Review the proposal per your regular business processes. Some typical areas of proposal review are listed below and are accessible from the Proposal Details page.

I. **Generate a Copy of the Routing Form**
   Proposal Details > Print > Click Show > Check Checkbox > Print Selected

II. **Access Narrative Documents**
    Proposal Details > Upload Attachments > Click View to Open each Attachment
III. Access the Budget
Proposal Details > Budget > Identify the Final Budget > Click Open
NOTE: Departments often upload an Excel file of the budget in the Narrative section (see step II above).

IV. Access the Credit Split
Proposal Details > Credit Split
4. Once you have verified the proposal is ok and ready to approve you may navigate back to the Proposal Details page and click on Approval Routing.

5. If approving, click the Approve link on the left. If you need to reject the proposal you would alternatively click the Reject link and follow the same process.
6. You may add an optional comment for the approval by typing into the comments text field and clicking the add button. If you were rejecting the approval, you must enter an appropriate comment, which is not optional.

NOTE: Do Not Use Attachments in the Proposal Approval/Rejection Process

7. Comments will be displayed on the List of Comments section in the middle of the page.

8. If you are ready to approve, click the Approve button on the bottom left.
9. You will see the approval routing page displayed after approving. To confirm the approval, scroll down if needed to reach the sequential stop you were approving.

10. For the sequential stop you approved, you should see “Approved” by your name and “Approved by Other” for alternate approvers.

11. Once you have verified the proposal has been approved, you may scroll back up to the top of the page and click the Logout button to end your session.
Search for a Proposal in CoeusLite

1. If you ever need to return to the proposal you approved you may search and retrieve the proposal using CoeusLite or Coeus Premium. Below is a brief set of steps to search for your proposal in CoeusLite.

   Instead of clicking the link in the email, you may also try to find your proposal by clicking the My Proposals link, which should automatically display Proposals in Progress. If you don’t see the proposal you are looking for on this page you may search for it using the Proposal Search button.

2. Enter in your search variables and click the Search button.

3. Your search results will be displayed. Click the link to open the proposal.
4. Click on Approval Routing on the lower left side.

5. Click the Approve link on the left if ready to approve and follow the same procedures outlined in the preceding section starting at step 3.