Overview:

This Quick Reference Card will introduce you to the Award document in Kuali Coeus. It covers basic navigation and documents elements at a high level. For a more detailed overview of the award please see the All About Awards Training Guide.

Notes:
For additional information on KC Awards, also see:
Website: KC.MIT.EDU
KC All About Awards Training Guide
KC All About Awards PPT
KC All About Awards Video

Procedure:

What is Kuali Coeus?

The Kuali Coeus system has been developed based on MIT’s Coeus system to assist the Office of Sponsored Programs, Departments, and Laboratories in proposal development and pre- and post-award management. The purpose of the system is to simplify and make it more efficient, award acquisition and administration for all offices within the Institution. With its comprehensive proposal development module and post award functionality, Kuali Coeus is a cradle-to-grave award management tool. This software makes it possible to prepare proposals, route them internally to obtain proper approvals, and submit them to sponsors electronically. The main modules in Kuali Coeus are: Proposal Development, Institutional Proposals, Awards, Subawards, Negotiations, Conflict of Interest, IRB, and Award Report Tracking.

The Award Module

The Award Module maintains detailed information on awards and subawards including a complete history of every change made to an award and subaward from notice through closeout. The Kuali Coeus system stores all agency contacts (in the electronic address book), maintains all reporting requirements (financial, technical, property, patents), maintains the terms and conditions, required cost sharing, special reviews (animals, human subjects, biohazards, etc.), F&A rates (whether limited by agency of fixed for the life on Federal awards), as well as the required approvals for equipment, foreign travel, and subawards.

For general questions send email to kc-help@mit.edu
Main Menu

When you log on to Kuali Coeus, you will see the **Main Menu** bar, which is always visible, consisting of the following tabs: **Home**, **Dashboard**, **Maintenance**, **System Admin Portal**, **Doc Search**, **Action List**, and **GET HELP**.

![Kuali Coeus Home Page](image)

**Figure 1** – Kuali Coeus Home Page

The top tabs represent a user group and functions associated with those users:

- **Home Screen** – All Users
- **Dashboard** – PI, Institute or DLC support activities
- **Maintenance** – Office of Sponsored Programs Personnel (Generate & Maintain SAP Feeds, Workload Balancing)
- **System Admin Portal** – Data Stewardship, Master Data Maintenance, and IT System Administration

The **Action List** and **Doc Search** are quick access buttons at the top of most screens which allow users to see communications, other documents, and workflow actions users are being requested to perform.

- **Action List** – opens a communications “**inbox**” and “**outbox**”.
- **Doc Search** – allows users to search for any documents they are authorized to access. By default, if no date is entered, a document search will only return current day’s documents

**Note**: There are over 300 document types in KC, and a **Doc Search** may be used to locate any document in KC. An award record may be made up of several linked Documents. The Doc Search does not allow you to search by account number, PI name, or Unit. To find Awards by these types of search criteria, the **Award Lookup** search is recommended instead.
Basic Guidelines

- Departmental/Faculty users will have View-only capabilities of the Awards in KC. Award modification is performed at OSP.

- When viewing an award, you will see the current status of the award. A timestamp of the last update is found on the Award Document Header (Last Update field). (Award History can be accessed by clicking the view history button on the Award tab → Details & Dates panel.)

![Figure 2 – Last Update Timestamp](image)

- The Award ID (Number) and the Version Number is shown on the Award tab → Details & Dates panel → Institution subpanel.

![Figure 3 – Award ID & Version Number](image)

Note about Kuali Coeus Award IDs

Award IDs (Numbers) are generated by Kuali Coeus and consist of a six-digit award base number, for example, **013696**. The digits following the award base number (-xxxxx) identify the award node. The first award created will always have the node ‘-00001.’ This may be the only node in the award, but will become a Level 1 – or ‘Parent’ - award if additional awards are added to the structure, thereby creating an Award Hierarchy.

There can only be one Level 1 - or Parent - award, there can be one or multiple Child awards created under the Parent award. Child awards are new nodes that are added sequentially under the Parent award and are numbered -00002, then -00003, and so on. Once a Level 2 award is established, additional Child awards can be added to the Level 2 branch, or a Level 3 branch, etc., under the Level 2 Child award.
Navigating the Award Module

Users can access Awards (depending on your roles and permissions) from the Home link, the Dashboard link and/or the Doc Search.

The Home tab contains links to Search for Post-Award and View All My Awards in the Post-Awards Menu Group. Search for Post-Award and View All My Awards links take you to the Award Lookup screen.

- The Search for Award option displays tools for entry and selection of various award-related criteria, which allows you to refine and conduct a search for Awards. From the search result table, you are then able to open or view medusa information about each Award displayed.
- The View All My Awards option displays Awards where you are listed as an Investigator and allows you to conduct a search for other Awards you have access to. From the search result table, you are then able to open or view medusa information about each Award displayed.
Using the Award Kuali Coeus Lookup Screens

To open/display an existing award, you will use the applicable Lookup Screen to enter your search criteria. The Award Lookup screen is displayed automatically when you click on a particular search link (Search for Post-Award or View All my Awards).

In the Award Lookup screen:
- You can search by ID number, status, PI name, title, and more.
- You can combine searches (i.e. searching for all ‘Active’ Awards for Investigator ‘Haskell’).
- The Lookup fields will accept requests in both alpha and numeric formats. For a numeric request or a request that combines numbers and letters, enter the argument exactly as it is stored in the database and the correct result will be returned.
- To enter partial values, you must use a Wildcard placeholder.

Note: Wildcards are characters that are used when entering search criteria in place of one or more unknown characters. The asterisk (*) wildcard is especially helpful when searching names, titles, organizations, etc. Since the data is entered in a very specific format, you must search using the same format to retrieve the desired results.

The Award Lookup screens in KC are built with various data fields:
- **Drop-down**: some fields in KC have drop-down lists associated with them to select a value from the list.
• **Lookup Icon**: Some fields have search icons associated with them, this allows you to search for and select a value from a search table.

• **Calendar**: Some fields have a calendar tool associated with them to select a date.

• **Text Fields**: Some fields are free text fields.

Once you enter your search value (or select from the drop-down list or search for it), you can click on the **Search** button or hit the `<Enter>` key to yield the results, which will appear at the bottom of the screen. Depending on your browser settings, you may need to scroll down to see the results.

**Note**: If your search is too general, the resulting list may be quite long and Kuali Coeus will take a moment to compile the list.

**Kuali Coeus Search Operators**

In the fields that do not contain a drop-down list or a search icon, you will need to enter all or part of a value you are searching for.

**Note**: Searches are not case-sensitive, so you can enter search terms in upper-, lower- or mixed-case.
Additionally, the following operators can be used to search in KC:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Used to Locate</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>No Operator</strong></td>
<td>All values that equal the text entered in the search field</td>
<td>Entering: <strong>1234567</strong> in the Account ID field. (Account ID must be exact otherwise no search results will be returned.)</td>
</tr>
<tr>
<td><strong>Asterisk</strong></td>
<td>You can use the wildcard * at the beginning or end of a text string, to indicate that there may be any number of characters before or after the text.</td>
<td>Entering: <strong>123</strong>* in the Account ID field. (This will display all Awards with Account ID starting with 123.)</td>
</tr>
<tr>
<td><strong>&lt;</strong></td>
<td>All the values are less than the value that follows. For numeric values, include any leading zeros.</td>
<td>Entering: <strong>&lt;1000000</strong> in the Account ID field. (This will display all Awards with Account ID less than 1000000.)</td>
</tr>
<tr>
<td><strong>&lt;=</strong></td>
<td>All values are less than or equal to the value that follows.</td>
<td>Entering: <strong>&lt;=1000000</strong> in the Account ID field. (This will display all Awards with Account ID less than or equal to 1000000.)</td>
</tr>
<tr>
<td><strong>&gt;</strong></td>
<td>All the values are greater than the value that follows</td>
<td>Entering: <strong>&gt;1000000</strong> in the Account ID field. (This will display all Awards with Account ID greater than 1000000.)</td>
</tr>
<tr>
<td><strong>&gt;=</strong></td>
<td>All values are greater than or equal to the value that follows.</td>
<td>Entering: <strong>&gt;=1000000</strong> in the Account ID field. (This will display all Awards with Account ID greater than or equal to 1000000.)</td>
</tr>
<tr>
<td><strong>&amp;&amp;</strong></td>
<td>And</td>
<td>Entering: <strong>&gt;0000108&amp;&amp;&lt;=0000208</strong> in the Account ID field. (This will display all Awards with Account ID greater than 0000108 and less than or equal to 0000208.)</td>
</tr>
<tr>
<td><strong>!</strong></td>
<td>All values are not equal to the value(s) entered.</td>
<td>Entering: <strong>!1000000!</strong> in the Account ID field. (This will display all Awards except those with Account ID 1000000.)</td>
</tr>
<tr>
<td><strong>?</strong></td>
<td>The ‘?’ will match any one characters before and/or after the values entered.</td>
<td>Entering: <strong>100?000</strong> in the Account ID field. (This will display all Awards with Account ID matching 1001000, 1002000, 1003000, etc. The ? will match any one character with 100 before it and 000 after it.)</td>
</tr>
<tr>
<td>**</td>
<td>(Or)</td>
<td>Entering: **!*108</td>
</tr>
</tbody>
</table>
**Sorting Search Results**

Often a search will result in returning a large list of records. To organize the data, you can sort the results by clicking on any column heading in the Award Search Result list.

To sort a long list of returns, click once on a column heading to sort in ascending order; click again for descending.

![Figure 11 – Sorting Search Results](image)

**Saving Search Results**

The results of any search can be exported to several different file formats. After you perform a search that you would like to save, click on the applicable file format buttons to download the results:

![Figure 12 – Results Export Options](image)

There are three different ways that you can download/save your results. The following methods are listed below:

<table>
<thead>
<tr>
<th>Download Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CSV</strong></td>
<td>Comma Separated Values file. Will download/open in Excel but will look and function slightly differently than the XLS file.</td>
</tr>
<tr>
<td><strong>XML</strong></td>
<td>Extensible Markup Language file. XML is a markup language that defines a set of rules for encoding documents in a format, which is both human-readable and machine-readable.</td>
</tr>
<tr>
<td><strong>Spreadsheet</strong></td>
<td>Excel file. Will download as an Excel file and creates a worksheet that is modifiable.</td>
</tr>
</tbody>
</table>

Table 2 – Search Results Download Options
Viewing Award

To access an Award in Kuali Coeus, users should perform a search for the award.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Open</td>
<td>Opens the Award.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copy</td>
<td>Allows users with appropriate authorization to copy the Award.</td>
</tr>
<tr>
<td>Medusa</td>
<td>Medusa</td>
<td>Displays the Medusa Information for the Award.</td>
</tr>
<tr>
<td>EDS</td>
<td>EDS</td>
<td>Displays the Electronic Documents Storage where authorized users have a one-stop access to documents linked to an award across modules (Development Proposal, Institute Proposal, and Award).</td>
</tr>
</tbody>
</table>

To open the Award, users should click the open link. This will open the Award Document, which contains links to the other documents that make up an award: Time & Money Document, and one or more Award Budget Documents.

The KC Award Document record is comprised of Document Header, 10 Tabs (each with expandable / collapsible Panels), and Action buttons. Each section of the award breaks out important award details. For all but OSP users (OSP users can modify the content), the information displayed on each tab is View/Read-Only. If you see information that is incorrect or needs updating, it can only be changed or updated by those authorized to maintain the award.
Award Status

It is important to note the Awards module always displays the current award status. Available status options are:

- **Active**: Award is billable. A fully executed award document or modification has been received for the award period entered. At MIT, any KC updates to this award will feed to SAP.
- **Inactive**: Administrative deletion of award.
- **Pending**: Award setup is not complete. Not yet billable – used for 90-day pre award cost or extension pending. At MIT, any KC updates to this award will feed to SAP.
- **Hold**: Being reviewed for various regulatory reasons. At MIT, changes to awards with Hold status are not fed to SAP. New awards created in Hold status are not fed to SAP.
- **Terminated**: The award has expired. Used only for Consortia Members.
- **Closed**: File is complete, all reports submitted and received.
- **Restricted-No Postings**: The account is active but only certain transactions will be allowed to post on this account.

**Note**: Clicking the help icons (❓) found throughout the Award Document (tabs, panels, etc.), will bring you to the online help information for the applicable section.

**Award Document Overview**

**Award Document Header**

The Award document header contains a date and time stamp, document number, and other important information that can be searched on later, such as the Initiator of the document, Sponsor Name, and the Principal Investigator.

![Figure 15 – Document Header](image)

This document header information also shows the **Status** of the document as it travels through the workflow:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>The document is approved.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The document is denoted as void and should be disregarded. Canceled documents cannot be edited.</td>
</tr>
<tr>
<td>Committed</td>
<td>The document has been committed to the database. You do not normally see the <strong>COMMITTED</strong> status. The only time it might show is when there is a system error or performance issue.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>The document is disapproved by an approver as a valid research administration transaction. Disapproved documents cannot be edited.</td>
</tr>
<tr>
<td>Enroute</td>
<td>The document has pending approval requests.</td>
</tr>
<tr>
<td>Exception</td>
<td>The document has been routed to an exception queue because workflow has encountered a system error when trying to process a rule.</td>
</tr>
<tr>
<td>Final</td>
<td>The document has been routed and has no pending approval or acknowledgement requests. Documents in <strong>Final</strong> status are considered approved.</td>
</tr>
<tr>
<td>Initiated</td>
<td>The document is created.</td>
</tr>
<tr>
<td>Processed</td>
<td>The document has no pending approval requests but still has one or more pending acknowledgement requests. Processed documents are considered approved.</td>
</tr>
<tr>
<td>Saved</td>
<td>The document has been started but not completed or routed yet. The <strong>Save</strong> action allows the initiator of a document to save their work and close the document. The document may be retrieved from the initiator’s action list for completion and routing at a later time.</td>
</tr>
</tbody>
</table>

**Table 4 – Document Workflow Status**
**Award Document Tabs and Panels**

Each tab in the Award Document represents a different area of information within the award. The current tab will be highlighted in white as shown in the figure.

![Figure 16 – Award Document Tabs](image)

Panels are the drop-down areas within a document tab, where data is maintained. Additionally, the show and hide buttons will open and close the panels to help the user concentrate on one area of data at a time.

![Figure 17 - Panels](image)

Additionally, there is a Time & Money button at the top of award document which tracks award transactions and contains the distribution and management of project funds within the award hierarchy.

![Figure 18 – Time & Money Button](image)

**Award Actions**

Actions buttons are always positioned at the bottom of the page.

![Figure 19 – Action Buttons](image)
Award Tab

The Award tab provides a summary of award information that is populated with data from the Institute Proposal record, an award template, hand-selected data, and custom text comments, which are then organized for consistent and quick summarization. Each award is crafted by OSP to capture the uniqueness of the award agreement. It includes information about funding proposals, subawards, dates, the project’s sponsor, and includes the following 6 panels:

- Document Overview
- Funding Proposal
- Details & Dates
- Subawards
- Sponsor Template
- Keywords

![Figure 20 – Award Tab](image)

Contacts Tab

The Contacts tab of the Award document has four panels that specify and maintain contact information for key personnel, unit, sponsor, and the administration contacts for the award. It provides a single, convenient location for contact information of institutional and sponsor personnel with roles in award administration, including organization (or unit), relationship with the project, address, email, and telephone numbers.
The Commitments tab contains three panels that identify financial commitments for the award:
- Cost Sharing
- Rates
- Preaward Authorizations

The Budget Versions tab will display Award Budget(s) created for the award. The Budget Versions tab consists of three panels: Budget Overview, Budget Versions, and Budget Limits.
The **Payment, Reports & Terms** tab provides the means, in accordance with federal regulations and/or institutional polices, to maintain detailed invoice, payment schedules, reports, terms, and other related information about the award.

There are six panels on the **Payment, Reports & Terms** tab:

- Payment & Invoices
- Contract And Grants Billing (not used at MIT)
- Reports
- Terms
- Special Approval
- Closeout
Special Review Tab

The **Special Review** tab contains information required for regulatory compliance. Special review types, approval status, relevant protocol number, and key date information is displayed, along with access to any comments provided by reviewers.

![Special Review Tab](image)

**Figure 25 – Special Review Tab**

**Note:** PI’s and their DLC administrators should notify their OSP administrator of any required maintenance to the special reviews for this project, especially adding new approved protocols. Maintenance to protocols should be processed through requests to the appropriate IRB (Internal Review Board) office (COUHES or the CAC).

Custom Data Tab

The **Custom Data** tab is where any award specific information is maintained from custom elements created in the system. It is used for internal processing to support data processing requirements.
Comments, Notes & Attachments Tab

Comments, Notes & Attachments tab displays comments, notes, and the attachments associated with the award. Attached documents may be restricted and unrestricted to viewing.

There are three panels on the Comments, Notes & Attachments tab:

- Comments
- Notes
- Attachments
Awards Actions Tab

**Awards Actions** tab includes information on the Award Hierarchy the Award is part of, as well as it allows you to Print award notices containing all or selected award components, including award modifications, if any, as well as award time and money transactions. Additionally, the Award document workflow status, actions take, and future action requested can be viewed in this section.

There are four panels on the **Award Actions** tab:
- Data Validation
- Hierarchy Actions
- Award Hierarchy Sync (only if Award Hierarchy exists; if the award is single level award then this panel will not be shown)
- Print
- Route Log

![Figure 28 – Award Actions Tab](image)

Medusa Tab

The **Medusa** tab displays the entire project lifecycle. It is a snapshot/overview of an award and proposal structure showing all of the KC module relationships in a simple, expandable/collapsible tree format. Not only can you research back in time the lifecycle of a project, but also Medusa has the added capability of allowing you to link into the details that are maintained in Kuali Coeus, so you can research the complete record. Access Medusa to better understand the relationship between Kuali Coeus modules and to seamlessly navigate to and from the award and the proposal details.

There are two distinct sections in the page display:
- **View**: Allows for selection of **Proposal>Award** or **Award>Proposal** options and a **refresh** button that refreshes the tree view below based on your selection.
- **Tree**: Displays a hierarchical view of related documents that you can expand and collapse to see their relationships
### Getting Help:

**OSP Contract Administrator**
To help with questions regarding Proposals and Award details, contact your OSP Contract Administrator.

**Kuali Coeus Support Team**
kc-help@mit.edu

KC system issues and authorizations - include your Name, Contact information, and the Award Number you are working on.