

## Coeus Roles

Roles in Coeus determine whether a Coeus User can create a proposal, make changes to an existing proposal, or simply view an existing proposal.

The following explanations describe roles typically assigned in Coeus, and the [training](#) that is recommended for each. Roles for Coeus Users in each unit (department, center, etc) are determined by the unit head and administration as part of the discussion of "mapping" (work flow of internal approvals for a unit and mapped into Coeus).

Role Changes: A [form](#) is available to request a change to a Coeus User's role. Note that the change will be effective only for newly created proposals in that unit. The role for proposals existing before the changes have been entered into Coeus will need to be changed by an Aggregator on a proposal-by-proposal basis, as needed.

Reminder: New researchers and employees who will be new Coeus Users will need to have an Employee ID or an [Affiliate ID](#) before they can be entered in Coeus as Users and before they will be able to access Coeus via the eUMB Portal.

## Role Descriptions

**Principal Investigator:** Creates a new proposal and may add information (Proposal Creator) including narrative attachments and budget. It is recommended that PIs take, at minimum the course called "Proposal Narrative Writer". If the PI will be involved with developing or modifying other parts of the proposal, such as Key Persons, the course entitled "Proposal Aggregator" would be helpful. If the PI will prepare the budget, then the "Proposal Budget Creator" course is recommended. PIs are required to certify each proposal for which they are the Principal Investigator and "Submit for Approval" to the routing process (internal approvals).

**Administrator (Proposal Creator):** As an administrator, creates a proposal for a PI  
Administrator (Aggregator): Adds information and narrative attachments to proposals; can see and work on all proposals in the unit. It is strongly recommended that all Administrators who will have the Proposal Creator and Aggregator roles take the "Proposal Aggregator" course and also the "Proposal Budget Creator" course. In most units, Administrators have both Proposal Creator and Aggregator roles.

**Proposal Creators and Aggregators are also given a role of Rolodex Maintainer.** A Coeus User with this role is able to add a non-UMB employee, such as a consultant or a collaborator from another university, to the Coeus Rolodex. Once the non-UMB employee has been entered into the Rolodex, that individual can be added to the Key Person tab for a proposal.

**Budget Creator:** Can add or modify budget for all proposals in the unit. An employee in this role should take the "Proposal Budget Creator" course.

**Approver:** Will be part of the proposal approval process for the unit, and is given the Viewer role in Coeus. The course entitled "Proposal Approver" is recommended for these individuals. For Approvers who have taken other Coeus training: this material is covered in the Proposal Aggregator course.