

# **COEUS 12 STEP PROGRAM (or what to do after installation)**

After Coeus has been installed and the database has been created and populated from the installation scripts, there are still a few steps you need to complete in order to start using Coeus. There are also a few things that you should NOT do.

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## ***Things to do***

### **Step 1 – Units and Unit Hierarchy**

- a. Change the top level Unit number (000001) description from MIT to your institution name, but DO NOT change the unit number. Coeus needs to have the top level unit code equal to '000001'. In the latest version of Coeus, you can edit the Unit 000001 information through the application, but in earlier versions, you have to edit the description of unit 000001 in the database. (osp\$unit)
  
- b. Add your institution's units and remove MIT's units. You can add your units using the application in the Unit Hierarchy Maintenance window. You can move the MIT units to some unused "node" within the hierarchy. (You cannot delete units in the application – so if you want to delete MIT's units you have to do this through the database).

A note about unit numbers. The database allows you to use 8 characters for the unit number. You can do this – but don't change the top level from '000001' to '00000001'.

### **Step 2 – Person table**

The OSP\$PERSON table has sample MIT people in it. You need to populate it with your institution's people. (We have a nightly download from our warehouse that populates OSP\$PERSON. It's up to you to decide how you are going to populate it.) To get started, you should at a minimum load the person\_id, first\_name, last\_name, full\_name ('last\_name, first\_name') and location. In Coeus 3.8 you can do this through the application (in Person Maintenance window), but in earlier versions you have to do this in Oracle.

### **Step 3 – Set up the Job code and the Appointment tables**

You should populate OSP\$JOB\_CODE table with your institution's job codes. Then you can populate OSP\$APPOINTMENTS. We have a nightly download from our warehouse that populates this table.

A Note about loading TBAs - In the proposal budget, when you want to create a salary line item and you are not sure about the person who needs to be assigned to the line item, you can assign a TBA to this line item. In order to be able to choose a TBA, TBAs should be loaded into OSP\$PERSON table and corresponding appointments should be inserted to OSP\$APPOINTMENTS table. If you decide not to load the TBAs make sure that you have at least one TBA with person ID 999999999. This TBA is required for THE print budget summary function.

### **Step 4 – Add Users and roles**

Refer to the directions on [http://web.mit.edu/osp/www/help\\_pages/add-users.html](http://web.mit.edu/osp/www/help_pages/add-users.html)

One note about adding users...If you follow the steps in the web directions to get to the User Maintenance window (Departmental -> Users), you will be adding users for your top level unit (OSP). This is probably what you want to do right now. But if you want to add users for other units, you first open the unit hierarchy, select the unit, and then go to Action->User Maintenance. This will allow you to establish users in the selected unit.

### **Step 5 – Set up Activity Types**

Institute rates are based on the Activity Type, as well as fiscal year and on/off campus flag. The installation scripts preload our Activity types. You should change these to match your institution's activity types if necessary. You can do this in the application using the Code Table Maintenance screen.

### **Step 6 – Set up Budget categories**

Budget categories can be edited in the Code Table Maintenance window. You can add/modify/delete categories, but you should be aware that this could affect the printed budget forms (and EDI file). The Coeus budget categories are mapped to printing/EDI categories, and these category codes are hard coded in stored procedures. This means

that if you change the Coeus budget categories, you should make sure that you have mapped them correctly to the printing/EDI categories. You have to do this in Oracle – the table involved is OSP\$BUDGET\_CATEGORY\_MAPPING.

### **Step 7– Set up Cost elements**

Use the Cost Element maintenance screen to add your institution’s cost elements. First you will have to delete the MIT cost elements from OSP\$COST\_ELEMENTS. This has to be done in Oracle. First you should delete rows from OSP\$VALID\_CE\_RATE\_TYPES and OSP\$VALID\_CE\_JOB\_CODES.

Note: There is a parameter in OSP\$PARAMETER for default\_budget\_cost\_element. Make sure you create a cost element for this parameter. It is used in the award budget window.

### **Step 8 – Set up Rate types and classes, and set the rates**

Set up rate classes and rate types, and then set the rates – all through the Rates Maintenance window

### **Step 9 – Map cost elements into all the rate class/rate types**

### **Step 10 – Set up the Organization**

- a. Make a rolodex entry for the contact address for your Sponsored Programs office.
- b. In Organization Maintenance window, change MIT institution information to your institution information – name, contact address. Leave the organization id set to ‘000001’.

### **Step 11 – Set up routing rules and maps specific to your institution**

There are no maps or routing rules in the base product. Follow the directions in [http://web.mit.edu/osp/www/help\\_pages/maps.html](http://web.mit.edu/osp/www/help_pages/maps.html) and [http://web.mit.edu/osp/www/help\\_pages/bus-rules.html](http://web.mit.edu/osp/www/help_pages/bus-rules.html).

### **Step 12– Set up parameters**

See separate document describing parameters

### ***Things you should NOT do.***

1. Do not change top level unit number. Leave it set to ‘000001’.

2. Code tables – In general, unless absolutely necessary, stay away from changing codes. You can change descriptions (with caution), and you can add new codes, but you should leave existing codes alone.
3. Do not change rate class codes. You can add rate types within a rate class. You can add new rate classes of type 'X' (other) or 'O' (overhead). Do not add new rate classes for Inflation, Vacation, or EB.
4. Do not choose a user name that is more than 8 characters.
5. Do not change the target budget category codes in OSP\$BUDGET\_CATEGORY\_MAPS. These are used for EDI and Proposal printing functions.
6. Some of the tables have id values that are '-1' or '0'. Do not change or delete these rows.