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Creating a new user

**Step one – Is the person established in other ASU Systems?**

For an individual to be a user for Coeus several conditions are required:

- The individual must have an ASURite ID, this ID will be used as their Coeus User ID. Before using Coeus the individual needs to activate their ASU computer account and ASURite ID.
- The individual must be an employee of ASU. Coeus receives an update from the Human Resources system each evening. This update provides the individual’s name, title, ASURite ID and other information. This information is not updated in Coeus, it is updated in the Human Resources system and then fed to Coeus. This way, Coeus has the official information about our employees.

**Step two – What is the person’s home unit?**

In most situations an individual will have his/her Coeus user record associated with their home unit. This information is available from the personnel information received by Coeus from the Human Resources system.

- Use Departmental Menu and select Personnel or use Personnel Icon
- Search for new user
- Display Person Detail
**Step three – Finding the unit in the Coeus unit hierarchy**

Coeus needs to know where in the ASU unit structure you want to add the user. To identify the unit to Coeus you must select it from the Unit Hierarchy.

- Use Admin menu and click on Unit Hierarchy
- Expand the tree structure to find the new user’s home unit
- Click on the unit to highlight it

**Step four – Add the user to Coeus**

You can add a user to Coeus if you have an administrator role. Central office staff in ORSPA can add users through the institution and for central office assignments. Coeus Administrators in other units will have the role of “ASU Unit Administrator” and will have the authority to add users to a portion of the unit hierarchy.

- Use Action menu and select User Maintenance
- The User Maintenance window will appear and states the unit name for example, “User Maintenance for B1309: Bioengineering, Harrington Department of”
- Use Edit Menu and select Create New User
- The window to add a new user will appear
Select Find button and find the new user using the person search facility.
Once selected from the person search the User Maintenance window will be filled with the new users information.

One possible error you may encounter is that the person has already been created as a Coeus user. In this case, you will not create a user record for him/her; you will only give him/her roles within the unit. This is explained in the next section.
Another possible warning is that the new user is identified with another unit. Coeus will warn you that you may be adding them to the wrong unit.

Enter an initial password and repeat it. Press OK.

The new user account has been created. Now you need to give the new user permission to do the activities related to their job. This action can also be done at the same time as you create the user.

**Step five – Adding an existing Coeus user to your unit’s users**

Sometimes you may want to add a person who is already a Coeus user to the users in your department. In this case you do not create a new user but search for an existing one.

- Use the User Maintenance Window for your unit.
- Click the Search Button (the magnifying glass).
- Search for the user by user Id or name.
- Select the person from the search results.
- Click “OK”.

The new user should now appear in the list of users for your unit.
Giving the appropriate roles to a user

Adding a new role for a user

Roles have been established in Coeus to control which modules an individual can use and which actions they can perform. A role is coded by color. “Red” roles are institute roles and are intended for central administration functions. “Blue” roles are related to proposals as they are developed. Currently ASU is not using Coeus for proposal development. “Yellow” roles are roles that are intended for use by unit staff. As a unit administrator you will not be able to assign institute “red” roles. Pick a role and select it.

Press Add and the role will move to the area under Roles assigned.
When you have completed adding roles, press the “OK” button to save the changes and now the user will have the capabilities associated with the role.

**Removing a role**

To remove a role from the user, use a similar procedure in reverse.

- Select a role from the Roles assigned column.
- Press the “Remove” button.
- Save the changes by pressing the “OK” button.
Removing a user from Coeus

Step one – Identify current roles in Coeus

There are many reasons a user may no longer need to use Coeus. If the individual leaves the university or accepts a position where their responsibilities are no longer related to Research Administration, the “ASU Unit Administrator” for their home unit should be notified.

To determine the current roles for the user:

- Select the user on the “User Maintenance” window.
- From the View menu, select “View Roles”.

The result will be a window similar to the one below. If you are not an administrator for the units listed, notify the administrator in those units so he/she can take appropriate action to remove the user’s roles related to that unit.
**Step two – Remove all roles for the user within your unit**

Use the procedure for removing roles to remove roles one at a time. This is a step that is good practice, but is not a requirement. There may be cases when you want to make a user “inactive” for a time, but not remove his/her roles. One example is when a staff member is “on leave” but will return to his/her responsibilities after the leave.

**Step three – Make the user inactive**

The next step is to make the user “inactive”. Users cannot be completely removed from Coeus by administrators.

To make the user inactive
- Click on the Status field and select “Inactive”
- Press the “OK” button

After you have done this the user will not be able to log into Coeus.