An Introduction to eDocs

What Are eDocs?
eDocs are short for “Electronic Documents”. They are transactions that are initiated in Kuali Coeus and routed through a prescribed sequence of approvers. In short, eDocs are what is being worked on when you create a proposal or a budget inside Kuali Coeus.

Types of eDocs
- A Proposal is made up of **two** eDocs
  - Proposal Development eDoc
  - Budget eDoc

In Kuali Coeus, a proposal is made up of a Proposal Development eDoc and a Budget eDoc.

When a proposal is initiated in Kuali Coeus, the proposal preparer begins filling out a sequence of tabs in the Proposal Development Document (eDoc) as well as budget information in the Budget Document (eDoc). These eDocs combined make up the proposal in totality.

The Proposal Development eDoc
When you open a proposal in Kuali Coeus, you are immediately taken to the Proposal Development Document. This is where the majority of proposal information is entered.
The Budget eDoc
There is a tab located in the Proposal Development Document entitled “Budget Versions”. Clicking this tab will take you to a page where you can open the budget(s) associated with the proposal (and subsequently the Budget eDoc).

Steps to Opening the Budget eDoc:
- Click the “Budget Versions” Tab of the Proposal Development eDoc.
- Click “Open” next to the Budget.
- You are now in the Budget eDoc.

To return to the Proposal Development eDoc, you need to click the blue “Return to Proposal” button. In doing this, you are actually jumping back and forth between two different eDocs (the Proposal Development eDoc and the Budget eDoc).
Searching With eDocs

Each eDoc has its own document number (see below). You can search for a specific eDoc by clicking the “Doc Search” button under the “Central Admin” Tab and entering the document number.

1. Click “Doc Search”

2. Enter Document ID (eDoc Number)

Searching this way will allow you to directly open a Proposal Development Document or a Budget Document.