

Proposal Development Training Exercises

University of Alabama - Huntsville

1. Navigate to <u>www.uah.edu/osp</u> and click on the Kuali Login Banner



2. Enter your username and password



Exercise 2– Completing the COI /Disclosure

 Kuali opens to the Dashboard. Expand the menu on the left side of the screen by clicking the Collapse Tab (>)

K	Dashboard	Show/hide sections
≣ Q 22 80 60 Φ	Proposals Routing to Me	Proposals Not Routing
© © ∪ ⊙ Ⅲ →	Post Award In Progress & Negotiations	Clear!

KUALI RESEARCH	Dashboard	Show/hide sections
Deshboard Home Search Common Tasks All Links Reports	Proposals Routing to Me	Proposals Not Routing
Configuration	All Clear!	All Clear!
	Post Award in Progress & Negotiations	
 Help About Logout Marshall, Paul 	All C	lear!
III Switch Apps		

2. From the left hand navigation panel click on Common Tasks

3. In the Common Tasks section under COI click My Disclosures

Common Tasks							
Quick Links	Award	соі	Institutional Proposal	Negotiation			
4 Action List	All My Awards	My Disclosures	ate Institutional Proposal	All My Negotiations			
⊲ ∋ Doc Search	Create Award		Create Proposal Log	Create Negotiation			
Support	Search Awards		Search Institutional Proposals	Search Negotiation			
1 Person Training			Search Proposal Logs				
Ciew S2S Submissions							
🔒 Locks							
Proposal Development			Subaward				
All My Proposals			Create Subaward				
Create Proposal			Search Subawards				
Search Proposals							

4. In the My Disclosures section click Create Disclosure

My Disclosures					
C Create Disclosure					
LAST ACTION DATE			LAST ACTION	STATUS	
You have yet to submit a dis	closure				

5. Answer the questions and click Next

CONFLICT OF INTEREST		kuali	Simmons, Whitne		
🗧 🗧 Back Update Annual D	isclosure				
SCREENING QUESTIONN	Reporter	Disclosure Status			
Certificiation	Simmons, Whitney wlp0002@uah.edu	In Progress			
	COI Form Instructions ALL questions on ALL forms must be answered in order to submit the disclosure The purpose of collecting this information is to comply with the University's Policy on Promoting Objectivity in Research and other federal and state regulations regarding conflicts of Interest. Your cooperation in fully and accurately answering the following questions is appreciated. This form must be updated within 30 days of acquiring any new or additional financial interest.				
	Did you or a family member receive during the calendar year just ended any the University, which includes your area of academic expertise or research in Ves No	hing of monetary value from any entity: (i) whose operations are related or potentially related to your institutional responsibilities at terest, or (ii) whose financial interest would reasonably appear to be affected by, or could affect, such institutional responsibilities?	√ Save		
	Do you or a family member have a current or pending ownership or equity in responsibilities at the University which includes your are of academic expert responsibilities? Ves No	terest (other than mutual fund holdings) in any entity: (o) whose operations are related or potentially related to your institutional ise or research interest, or (ii) whose financial interest would reasonably appear to be affected by, or could affect, such institutional			
	Do you or a member of your family have intellectual property right and intere University affiliate? Ves	sts and income related to such rights and interests paid during the calendar year just ended by an entity other than the University or			
	O No				

6. Once all questions have been answered on the multiple screens, click Submit

CONFLICT OF INTEREST	kuali	Simmons, Whitney
← Back Update Annual	Disclosure	
Screening Questionnaire	Reporter Disclosure Status	
CERTIFICIATION	Simmons, Whitney In Progress wlp0002@uuh.edu	
	Financial Interest Acknowledgment As an individual who is independently responsible for the design, conduct, or reporting of research at the University, with regard to your financial interests and those of your family related to your institutional responsibilities, which includes your area of academic expertise or research interest, you are required to:	that reasonably appear to be 99% Complete
	Submit an updated disclosure within 30 calendar days of discovering or acquiring a new financial interest; and Update at least annually the financial information you have disclosed.	Submit
	By pressing the Submit button you certifying you have read and understand the above text and that the financial interest information that you have disclosed to VPR (including that current to the date hereoi. Including the information submitted herein.	t of my family) is complete and
	In completing and submitting this External Entity Disclosure and Certification, I affirm that the information submitted is true to the best of my knowledge and I certify that I have re University's Policy on Promoting Objectivity in Research. That I have made all required disclosures, and that I will comply with any conditions or restrictions imposed by the Univer eliminate conflicts of interest.	ead and understand the sity to manage, reduce or
	Thank you for completing this External Entity Disclosure and Certification. Should your answer to any question change, please update your information.	
	Confidential Personnel Record Disclosure documents, conflict of interest management or mitigation plans, and related information are considered to be personnel records and shall be confidential to the extent required for administration of the Policy on Promoting Objectivity in Research.	permitted by law, except as
	Do you have any attachments to include with your disclosure?	
	O Yes	
	No	

7. Once completed, a Print option will appear

CONFLICT OF INTEREST		kuali			Simmons, Whitney	
🗧 🗧 Back Update Annual Disc	closure					
Reporter Simmons, Whitney	Disclosure Status Up to Date	Submitted Date Aug 15, 2019 1:35 PM	Approved Date Aug 15, 2019 1:35 PM	Disposition No Conflict	🖶 Print	
wlp0002@uah.edu					Management Plan	
COI Form Instructions The purpose of collecting this informati following questions is appreciated. This important to fully understand the definit Did you or a family member receive duri academic expertise or research interest	on is to comply with the University's Policy on P form must be updated within 30 days of acquir tion of terms in order to accurately complete the ing the calendar year just ended anything of more or (III) whose financial interest world reasonab	LL questions on ALL forms must be answered in order romoting Objectivity in Research and other federal and ing any new or additional financial interests or relation questionnaire. Netary value from any entity: (i) whose operations are re vapear to be affected by, or could affect, such institu	to submit the disclosure state regulations regarding conflicts of interest. You ships. Please click the help icon under each questio elated or potentially related to your institutional resp titional responsibilities?	ar cooperation in fully and accurately answering the for definitions to key world in the question. It is onsubilities at the University, which includes your area of		
"Family Members" is defined to include spo for more than 180 days during the reporting	ouse or any dependent. "Dependent" is any person, re g period.	gardless of his or her legal residence or domicile, who rece	ives 50 percent or more of his or her support from the In	vestigator or his or her spouse or who resided with the Investigator		
"Monetary Value" is anything of value, whet fees), commissions, equity interests (includ forgiveness of debt.	ther or not the value is readily ascertainable, includin des any stock, stock option, or other ownership inter-	ut not limited to: remuneration or salary (including paym est), interests in real or personal property, dividends, royaltie	nent for services not otherwise identified as salary, e.g.,	consulting fees, honoraria, paid authorship, board membership rests (e.g., patents, copyrights, and related income), and		
"Entity" means any domestic or foreign, put	blic or private organization (excluding a federal agen	cy) from which an Investigator or family members receive n	emuneration or in which any of such persons has an exe	cutive position or ownership or equity interest.		
"Institutional Responsibilities" are defined a service responsibilities within the University No	as the professional responsibilities (e.g., academic o y .	r research area of interest or expertise) of an Investigator o	n behalf of the University to perform duties and/or activi	ties that are undertaken to fulfill one's research, teaching, or		
Do you or a family member have a curre your are of academicers for the transferred of the	ent or pending ownership or equity interest (othe bate dt 8/119/119 ncial interest would suse or any dependent. Dependent' is any person, re period	r than mutual fund holdings) in any entity: (o) whose of d reasonably appear to be affected by, or could affect, rgardless of his or her legal residence or domicile, who rece	perations are related or potentially related to your in such institutional responsibilities? ives 50 percent or more of his or her support from the in	stitutional responsibilities at the University which includes vestigator or his or her spouse or who resided with the Investigator		

8. Annual Disclosure Status will update and reflect "Approved"

Whitney Simmons (Key Person: Ass	istant)	
Project Status: Disclosure Not Require	Annual Disclosure Status: Approved	isposition Status: None

Exercise 3 – Initiating a Proposal

 Kuali opens to the Dashboard. Expand the menu on the left side of the screen by clicking the Collapse Tab (>)

K	Dashboard			
≣ ⊲	Proposals Routing to Me	Proposals Not Routing		
2				
٠				
	All Clear!	All Clear!		
Ø	Post Award In Progress & Negotiations			
6				
с				
© 				
>		All Clear!		

2. From the left hand navigation panel click on Common Tasks

KUALI RESEARCH	Dashboard	Show/hide sections
 Dashboard Home Search 	Proposals Routing to Me	Proposals Not Routing
Common Tasks		
16 Reports		
Configuration	All Clear!	All Clear!
	<	
	Post Award in Progress & Negotiations	
@ Help 🖸		All Clear!
ර Acout		
Marshall, Paul		

3. In the Proposal Development window, select Create Proposal

SANDBOX ENVIRONMENT							
KUALI RESEARCH		Locks					
 Dashboard Home Q Search 		Institutional Proposal	Negotiation	Proposal Development			
🗘 Common Tasks		Create Institutional Proposal	All My Negotiations	All My Proposals			
G All Links		Create Proposal Log	Create Negotia	Create Proposal			
		Search Institutional Proposals	Search Negotiation	Search Proposals			
⑦ Help	ß	Search Proposal Logs					
i About							
ப் Logout		Subaward					
😚 Rodgers, Jessica	ß	Create Subaward					
Switch Apps		Search Subawards					
< Collapse Menu							
	;;; w]	XI 📴 😕 🩋 🧿		ペーク に (小) 4:25 PM (1/2019)			

- 4. In the Create Proposal window select the following information:
 - Proposal Type: New
 - Lead Unit: 233100 Civil and Environmental Engineering
 - Activity Type: Research Applied
 - Project Dates: 9/01/2019 (start date) and 08/31/2024 (end date)
 - Project Title: My Important Project <enter your initials>
 - Sponsor: NIH

NOTE: All sections with an asterisk (*) must be completed.

	SANDBOX ENVIRONMENT						
K	Kuali Research	BEFORE					
•	Create Proposal * indicates required fields						
	Proposal Type: *	select Y					
ප	Lead Unit: *	select •					
	Activity Type: *	select r					
୭	Project Dates: *	mm/dd/yyyy to mm/dd/yyyy					
0	Project Title: *						
ი	Sponsor: *	Q					
œ							
		Cancel Save and Continue					
>							

5. Click Save and Continue

		SANDBOX ENVIRONMENT	1				
K	Kuali Research	AFTER					
∎ Q	Create Proposal * indicates required fields		l				
2	Proposal Type: *	New T	l				
θ	Lead Unit: *	233100 - Civil and Environmental Engineering					
	Activity Type: *	Research - Applied					
୭	Project Dates: *	09/01/2019 to 08/31/2024	l				
© (i)	Project Title: *	My Important Project-O.S.P	l				
ሳ	Sponsor: *	365 National Institute of Health Q	l				
			l				
Ⅲ >		Cancel Save and Continue					

6. The proposal will open with the display defaulted to the Proposal Details screen.

			SANDBOX ENVIRONMENT							
₹ ≣ α 2	Kuali Research Proposal Development Proposal: #75 PI: Not yet assigned	The proposa internal num	I number to the left (#75) is an observe to record working proposals.	Uocument Info Doc Nbr: 25513 S25 Connected Initiator: mccom Status: In Progra more	▲ tbj ess					
Θ			✓ Data Validation (off) 🖶 Print 👁 Copy 📰 Medusa 🗦 Hierarchy	💷 Budget Versions 🔗 Link 💿 Help 🚽	•					
	Proposal Details * indicates required fields									
	Proposal Details	 Document was successfully saved. 			x					
	S2S Opportunity									
	Delivery Info	Proposal Type: *	New		•					
	Sponsor & Program Information	Lead Unit:	233100 - Civil and Environmental Engineering		_					
	Organization and Location	Activity Type: *	Research - Applied		•					
	Key Personnel >	Project Dates: *	09/01/2019 to 08/31/2024							
	✓ Compliance	Project Title: *	My Important Project-O.S.P							
	N Attachments									
0	Questionnaire	Sponsor: *	365	National Institute of Health	Q					
(i)	Budget	Prime Spansor Code:								
(l)	Access	r nine sponsor code.			<u>~</u>					
	Supplemental Information	<i></i>								
	Summary/Submit	Keywords:	Nothing selected		-					
****			Save Save and Continue Close		• •					

NOTE: The **Prime Sponsor** can be searched by name or by the designated code number.

Exercise 4 – Selecting System-to-System (S2S) Opportunities

 In the S2S Opportunity screen, if the opportunity is available in Grants.gov then the required documents can be added to the proposal for submission and data validation in this section. Click the Find an Opportunity button

		SANDBOX ENVIRONMENT	^
K	Kuali Research		
55	Proposal Details	Document was successfully saved. X	•
Q 1	S2S Opportunity	Q. Find an opportunity	
	Sponsor & Program Information	User Attached Forms	
	Organization and Location	User Attached Forms	
	L Key Personnel >	+ Add User Attached Form	
	✓ Compliance		
	Not Attachments		
	Questionnaire		
	Budget		
0	Access		
(i)	Supplemental Information		
сı	Summary/Submit		
o	Super User Actions		
	Notifications History		1
>		Back Save Save and Continue Close	

2. If the **Opportunity ID** is unknown, perform a search by selecting the magnifying glass.

	SANDBOX ENVIRONMENT									
K	Kuali Research									
		Document was successfully saved.								
a	Proposal Details	Lookup ×								
	S2S Opportunity									
	Delivery Info	Opportunity Search								
Θ	Sponsor & Program Information									
	Organization and Location	Search Domain * Grants.Gov V Q								
	▲ Key Personnel >	+ Package ID								
	✓ Compliance									
	S Attachments	Opportunity ID								
	(?) Questionnaire	Competition ID								
	Budget	CFDA Number								
0	Access									
6	Supplemental Information									
ወ	Get Summary/Submit									
<u>.</u>	Super User Actions									
	Notifications History	Ciose Ciear values Saarch								
>		Back Save Save and Continue Close								

Exercise 5 – Completing Delivery Information (OSP Only)

In the **Delivery Info** screen, select the method of delivery for the proposal and complete the relevant information. This section is optional.

K	Kuali Research									
==				✓ Data Validation (off)	👁 Сору	Medusa	≣ Hierarchy	Budget Versions	S Link	Help •
Q	<	Delivery Info								
	Basics ~	Document was successfully saved.								х
وي	S2S Opportunity	Submission By:	select							•
	Delivery Info	Submission Type:	select							•
	Organization and Location	Submission Account ID:								
	▲ Key Personnel >	Submission Name & Address:	Change	Clear						
	 Compliance 	Submission description:								
0	Attachments									
(i) 	Budget									
0	Access									

Exercise 6 – Completing Sponsor & Program Information

- 1. In the Sponsor & Program Information screen select/enter the following:
 - Sponsor Deadline: 10/05/2019 12:00 p.m.
 - Sponsor Deadline Type: Receipt
 - Notice of Opportunity: Federal Solicitation
 - NSF Science Code: Biological and Biomedical Sciences–Life Sciences: D.02
- 2. Enter the CFDA number: 93.859 and click ADD
- 3. Click the Save and Continue button

	Sponsor & Program Informatio	n							
🖹 Basics 🗸 🗸	 Document was successfully saved. 			х					
Proposal Details									
S2S Opportunity	Sponsor deadline:	10/05/2019	12:00 PM						
Delivery Info	Sponsor Deadline Type:	Receipt		•					
Sponsor & Program Information	Notice of Opportunity:	Federal Solicitation							
Organization and Location	Opportunity ID:								
L Key Personnel >	opportanty ior								
 Compliance 	Subawards:	Ves, this proposal includes subaward(s)							
N Attachments	Sponsor Proposal ID:								
Questionnaire	-								
Budget NSF Science Code:		Biological and Biomedical Sciences - Life Sciences: D.02 🔹							
Access	Anticipated Award Type:	select		Ŧ					
Supplemental Information	Agency Routing Identifier:								
Summary/Submit	Prev Grants.Gov Tracking ID:								
Super User Actions	Opportunity Title:								
Notifications History				1					
	▼ CFDA								
	CFDA Number *	CFDA Prog		Actions					
	93.859			Add					
	Back Save and Continue Close								

Exercise 7 – Completing Organization & Locations

1. On the **Organization and Location** screen, the **Applicant Organization** tab will display first. The university's information will generate automatically.

K	Kuali Research	
::	Basics ~	
۹	Proposal Details	Organizations & Locations
	S2S Opportunity	Applicant Organization Performing Organization Performance Site Locations Other Organizations
Θ	Delivery Info Sponsor & Program Information Organization and Location	Applicant Organization
	▲ Key Personnel >	Organization Name The University of Alabama in Huntsville
	✓ Compliance	Address Line 1
	Attachments	Address Line 2 Address Line 3
?	Questionnaire	City
0	Budget	State
ባ	Access	
\odot	Supplemental Information	+ Add Congressional District
Ⅲ >		Back Save Save and Continue Close

2. The Performing Organization tab does not apply to UAH

K	Kuali Research	
: ;;	🖹 Basics 🗸 🗸	
۹	Proposal Details	Organizations & Locations
	S2S Opportunity	Applicant Organization Performing Organization Performance Site Locations Other Organizations
e	Delivery Info	Performing Organization
	Sponsor & Program Information	
	Organization and Location	Details Q Select Different Organization
	L Key Personnel >	Organization Name The University of Alabama in Huntsville
	✓ Compliance	Address Line 1
	Attachments	Address Line 2
0	Questionnaire	City
()	Budget	State
		Postal Code
0	Access	
	Supplemental Information	+ Add Congressional District
		Back Save Save and Continue Close
>		

3. If the work will be performed off campus, click Performance Site Locations

a. Click Add Performance Site

K	Kuali Research	
	Basics ~	
۹	Proposal Details	Organizations & Locations
	S2S Opportunity	Applicant Organization Performing Organization Performance Site Locations Other Organizations
e	Delivery Info	
	Sponsor & Program Information	Performance Site Locations
	Organization and Location	
	Key Personnel	Q. Add Performance Site
	✓ Compliance	
	Notachments	
?	Questionnaire	
0	Budget	
ባ	Access	
\odot	Supplemental Information	
>		Back Save Save and Continue Close

b. In the Address Book Lookup window Search and find Integration Innovation, Inc. (i3)

Lookup	×						
Address Book Lookup	<u>^</u>						
	Add New Address Book						
Address Book Id:							
Sponsor Code:	۹						
Sponsor:	۹						
Sponsor Address Flag:							
Organization:	Integration Innovation*						
Last Name:							
Close Clear Values Search							
4	•						

c. Place a check mark in the box and click return selected

Lo	okup														×
•	One item r	etrieved.												Х	•
Sho	w 10	▼ entries											CSV	xml xls	
•	Address Book Id	≎ Organization	Last≎ Name	First Name	Middle Name	Addres\$ Line 1	Address Line 2	Address Line 3	≎ City	≎ County	≎ State	Country Code	Postâl Code	Email ≎ Address	-
	2153	Integration Innovation, Inc. (i3)				689 Discovery Drive			Huntsville		AL	USA			1
Showing 1 to 1 of 1 entries return selected First Previous 1 Next Last															
Refine Search Close															

d. Click the + Add Congressional District button

K	Kuali Research						
	Basics ~ Proposal Details	Applicant Organization Performing Organization	Performance Site Locations	Other Organizations			
	S2S Opportunity Delivery Info	Performance Site Locations					
9	Sponsor & Program Information	Q Add Performance Site					
	Organization and Location		Organization Name:	Integration Innovation, Inc. (i3)			
	Key Personnel >		City:	Huntsville			
	✓ Compliance		AL				
	S Attachments		Address Line 1:	689 Discovery Drive			
0	(2) Questionnaire		Address Line 2:				
	() questionnaire		Postal Code:				
Û	D Budget	+ Add Congressional District					
	Access	▶ AL-007		×			
\odot	Supplemental Information						
>		Back Save	Save and Continue Clos	se			

- e. In the Add Line window select:
 - i. State: Alabama
 - ii. District Number: 7
- f. Click the Add button

Add Line		×
State: District Number:		T
	Cancel Add	

g. Click the Save button

K	Kuali Research				
	Basics ~	Applicant Organization Performing Organization	Performance Site Locations	Other Organizations	
Q ₽	S2S Opportunity	Performance Site Locations			
9	Delivery Info Sponsor & Program Information	Q Add Performance Site			
	Organization and Location		Organization Name:	Integration Innovation, Inc. (i3)	×
	Key Personnel >		City:	Huntsville	
	✓ Compliance		State:	AL	
			Address Line 1:	689 Discovery Drive	
0	Questionnaire		Address Line 2:		
G	Budget		Postal Code:		
с U	Access	Add Congressional District AL-007			×
•	Supplemental Information				
		·			
>		Back Save	Save and Continue Clo	se	
	Last Updated 8/19/19				

4. If there are vendors and/or subrecipients on the proposal, their information will be entered under **Other Organizations**.

🖹 Basics 🗸 🗸				
Proposal Details	Organizations &	Locations		
Delivery Info	Applicant Organization	Performing Organization	Performance Site Locations	Other Organizations
Sponsor & Program Information	- approxime organization	- ononing organization	· · · · · · · · · · · · · · · · · · ·	ouror orgunizations
Organization and Location	Other Organizati	ions		
L Key Personnel >				
✓ Compliance	Q Add Organization			
N Attachments				
Questionnaire				
Budget				
Access				
Supplemental Information				
Summary/Submit				
Super User Actions				
Notifications History				

5. Click Save and Continue

Exercise 8 – Adding Key Personnel, Updating Details & Certifying

1. From the Key Personnel screen, select Add Personnel

K	Kuali Research	
::	Basics ~	
۹	L Key Personnel >	Key Personnel
ŵ	Personnel	Search for and add key personnel
e	✓ Compliance	1 Add Personnel
	N Attachments	,
	Questionnaire	
	Budget	
	Access	
୭	Supplemental Information	
•	Summary/Submit	
Ф Ф	Super User Actions	
0	Notifications History	
•		
		Back. Save Save and Continue Close

- 2. Select Employee radio button
- 3. Last Name: <USE YOUR NAME>
- 4. Click the **Continue** button

Add Personnel		×
Search for	 Employee Non Employee 	
Last Name	Loyd	
First Name		
User Name		
Email Address	user@domain.com	
Office Phone		
Home Unit		۹
Campus Code		م
Last Updated 8/19/19	Continue	

- 5. In the search results window select the radio button for YOUR NAME
- 6. Click the Continue button

Add Personnel										×			
C	Only the top 200 results were returned. If you cannot find what you are looking for, please refine the search criteria												
	Full Name	e: User ID:	Email Address:	\$	Unit Number:	¢	Unit Name:	\$	Organization:			÷	City: ≎
	Nicholas Loyd	loydn	loydn@ua	h.ed	u610001		Center for Management and Economic Research	;	Center for Manageme Research	nt a	and Economic		Campus
S	howing 1 to 1	of 1 entr	ies						Fi	rst	Previous 1	Nex	t Last
							Continue Go back Cano	cel					

- 7. In the Assign a role window select the radio button for PI/Contact
- 8. Click the Add Person button

Add Personnel			×
Assign a role			
Assign a role: *			
PI/Contact			
PI/Multiple			
Co-Investigator			
Key Person			
	Add Person Go back	Cancel	

9. Click the arrow (>) next to the name of the PI/Contact

K	Kuali Research		
8	Basics ~		
٩	L Key Personnel >	Key Personnel	
	Personnel	Search for and add key personnel	
_	✓ Compliance	1 Add Personnel	
65	N Attachments		
	Questionnaire	N cholas Loyd (PI/Contact) (Certification Incomplete)	B
	Budget	Status: Annual Disclosure Status: Disposition Status: Not Yet Dispositioned	
	Access		
6	Supplemental Information		
© 	Summary/Submit		
• •	Super User Actions		
0	Notifications History		
•			
		Bark Save Save and Continue Close	
>			

10. The **Details** tab will automatically populate

Nicholas Project Status:	Loyd (Key Person: sir : Disclosure Not Req	ng) uired Annual Disc	closure Status	a: Approved Dis	position State	us: None				Notify Nicholas Loyd
Detail	Organization E	Extended Details	Degrees	Unit Details	Person Trai	ining Details	Proposal Pe	erson Certification		
Details										
	Proposal Person R	ole Id: Key Perso	n					Key Person's role wil	l be: *	sing
	Full	Name: Nicholas L	.oyd					User	lame:	loydn
	First	Name: Nicholas						Last	lame:	Loyd
	Middle	Name:						eRA Commons User M	lame:	
	N	ISF ID:								
				Bac	k Save	Save and Cor	ntinue Cle	ose		

11. Select the Person Training Details tab to view completed training, then click Save and Continue

 Nicholas Loyd (Key Person: sing) Project Status: Disclosure Not Required Annual Disclosure Status: Approved Disposition Status: None 									
Details	Organization	Extended Details	Degrees	Unit Details	Person Training Details	Proposal Person Certification			
Persor	Training [Details							
				Bad	* Save Save and Co	ntinue Close			

12. The PI, Co-I, and Key Personnel will complete the **Proposal Person Certification** for each proposal 13. Click **Save and Continue**

Exercise 9 – Adding Special Review/ Compliance Information

1. On the **Compliance** screen, click the **+** Add compliance entry button

K	Kuali Research	
	🗏 Basics 🗸	
	👤 Key Personnel 🗸 🗸	Compliance
~	Personnel	
	Compliance	+ Add compliance entry
Θ	S Attachments	
	Questionnaire	
	Budget	
	Access	
	Supplemental Information	
0	Summary/Submit	
(Super User Actions	
	Notifications History	
\odot		
>		Back Save and Continue Close

- 2. In the Add Compliance Entry window, enter the following:
 - i. Type: Human Subjects
 - ii. Approval Status: Pending
- 3. Click the Add Entry button

Add Compliance Entry ×								
Type: *	Human Subjects	۹						
Approval Status: *	Pending V	٩						
Protocol Number:								
Application Date:								
Approval Date:								
Expiration Date:								
Exemption #:	Nothing selected	-						
Comments:		//						
	Add Entry Cancel							

4. Click the Save and Continue button

K	Kuali Research			
::			① Document was successfully saved.	×
۹	Basics	~		
۵	1 Key Personnel	~	Compliance	
ම	Personnel			
	✓ Compliance		+ Add compliance entry	
	Attachments		Liberary Cablers Densities	
	Questionnaire		r numan subjects renaing	
	D Budget			
	Access		_	
	Supplemental Information			
	🕪 Summary/Submit			
୭	Super User Actions			
	Notifications History			
U O				
C				
			Back Save Severand Confirme Close	
>			Falser Caller Date and Country (1996)	

Exercise 10 – Adding Attachments

NOTE: Documents (i.e. the budget justification, Narrative, etc.) supporting the proposal should be uploaded under the Proposal tab.

1. On the Attachments screen, select Proposal tab, then click the + Add button

K	Kuali Research											
	L Key Personnel >											
۹	✓ Compliance	Attachments										
	Note Attachments	Pronneal (0) Berconnel (0) Abstracts (0) Internal (0) Mintee (0)										
- 9	Questionnaire											
	Budget	Proposal (0)										
	Access	Add attachments to this proposal										
	Supplemental Information	Ada Download All Set All Statuses Select ▼										
	Summary/Submit											
୭	Super User Actions											
•	Notifications History											
<u>с</u>												
0												
•												
		Back Save Save and Continue Close										
>												

- 2. In the **Details** window, select the following:
 - b. **Type**: select **Narrative** from the drop-down menu
 - c. Status: Complete
 - d. Description:
 - e. Click the Choose File button and upload Narrative.pdf file
- 3. Click the Save button

Details
Attachment Type: *
Status: *
Complete 🔹
Contact Name:
Email Address:
Phone Number:
Comments:
Description:
File:
Choose File No file chosen
Save

NOTE: All saved documents will display on each tab they were uploaded under. Select each tab to move from one to the other. **Save and Continue** will take you to the next section, not to the next tab.

					✓ Data Validation (off) 🖶 Print 🛛 👁 Co	py 📑 Medusa	I≡ Hierarchy	udget Versions	S Link	Help +
Basics	Attachments Attachments										
✓ Compliance	Proposal (1) Personne	el (0) Abstracts (0)	Internal (0)	Notes (0)							
🗞 Attachments	Proposal (1)										
 Questionnaire Budget 	Add attachments to this propo	sal							Set All Status	es select	¥
Access	File	Туре *		Status *	Description		Uploaded By	Posted Timestamp	Actions		
Supplemental Information Summary/Submit Notifications History	1 AlaFlavoursFINAL.pdf	Narrative	T	Complete			Pitts, Antonia	08/13/2019 03:08 PM	1 Details vi	ew/edit rights	8
			Bac	k Save Sa	ave and Continue Close						

4. On the Attachments screen, select Personnel tab, then click the + Add button

K	Kuali Research	
	D Danier	Attachments
	Key Personnel	Document was successfully saved.
Ð	Personnel Compliance	Attachments Proposal (0) Personnel (0) Abstracts (0) Internal (0) Notes (0)
	Questionnaire Budget	Personnel (O) Add attachments to this proposal Add attachments at this proposal Add attachments at this proposal
	Access Supplemental Information Summary/Submit	
0 0 0	 Super User Actions Notifications History 	
		Back Save and Continue Close

- 5. In the **Details** window, select the following:
 - f. Person: select from the drop-down menu (YOUR NAME)
 - g. Type: Biosketch
 - h. Description: Technical Volume I
 - i. File: Click the Choose File button and upload Biosketch.pdf file
- 6. Click the **Save** button

Details	Required	×
Person: *		
Туре: *		
select Description:		Ŧ
File:		
Choose File No file chosen		
	Save	

Exercise 11 – Completing Questionnaire

Skip this section. This only applies to S2S submissions. Click Save and Continue

K	Kuali Research		
		<	① Document was successfully saved.
٤	Basics	~	
2	L Key Personnel	~	Questionnaire
Э	Personnel		There are no questions defined for this proposal.
	✓ Compliance		
	Attachments		
	Questionnaire		
	D Budget		
	Access		
	& Supplemental Information		
	Summary/Submit		
ภ	Super User Actions		
ĥ	Notifications History		
Ĺ			
9 			
			Back Save Save and Continue Close

1. On the **Budgets** screen click the + Add Budget button

K	Kuali Research		
::		<	① Document was successfully saved. X
۹	Basics	~	N
۷	1 Key Personnel	~	Budgets +Add Budget
Ð	Personnel		The following budgets are linked to this proposal.
	✓ Compliance		
	Attachments		
	(2) Questionnaire		
	Budget		
	Access		
	Supplemental Information		
	Summary/Submit		
ര	Super User Actions		
。	Notifications History		
<u>с</u>			
*			Back Save Save and Continue Close

- 1. In the Create a Budget Version window enter the following:
 - i. Budget Name: My Summary Budget
 - ii. Would you like to create a detailed budget or enter a summary only?: Start a Summary Budget
 - iii. Will this be a modular budget?: No
- 2. Click the Create Budget button

Create a Budget Version	×
Proposal: 75 Budget Name: *	
My Summary Budget Would you like to create a detailed budget or enter a summary only?: * Start a detailed budget Start a summary budget	
Will this be a modular budget?: * Yes <a>No	
Create Budget Cancel	

- 3. Enter the following information for each budget period that displays.
 - Direct Costs: 10000
 - Indirect Costs: 4800
 - Cost Share: 1000

4. Click Save

						 Data Validation (off) 	Budget Settings	I≡ Hierarchy @ Su	immary 💿 Budget V	/ersions	culate Periods 🛛 🗇	Help 👻
« Return to proposal	<	Periods & To	otals							Recalculate with cha	nges Reset to perio	d defaults
F Periods & Totals		+ Add Budget Period										
Rates		Period Start Date *	Period End Date * ^{\$}	Months \diamond	Total Sponsor Cost	Direct Cost	F&A Cost \diamond	Unrecovered F&A [‡]	Cost Sharing	¢ Cost Limit	Direct Cost Limit	Actions
Personnel Costs	>	09/01/2019	08/31/2020	12.0	14,800.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0.00	Ê
Non-Personnel Costs		09/01/2020	08/31/2021	12.0	14,800.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0.00	Ê
No Subawards		09/01/2021	08/31/2022	12.0	14,800.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0.00	8
A Institutional Commitments	~	09/01/2022	08/31/2023	12.0	14,800.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0.00	8
Project Income		09/01/2023	08/31/2024	12.0	14,800.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0.00	8
 Modular 	C			Total: 60.00	Total: 74,000.00	Total: 50,000.00	Total: 24,000.00	Total: 0.00	Total: 5,000.00	Total: 0.00	Total: 0.00	
Budget Notes												
Budget Summary					-							
					•							
				S	ave Save and Cont	inue Complete Bud	lget Close					

- 5. On the Institutional Commitments screen, enter Source Account (600001) number(s) on the Cost Sharing screen
- 6. Click Save and Continue

			🛩 Data Validation (off) 🌣	Budget Settings i≡ Hierarchy ⊲	Summary Budget Versions	Autocalculate Periods ⑦ Help →
<	Cost Sharing					View Subaward Cost Share
« Return to proposal	Assign and distribute any additional unallocat	ed expenses to stakeholders, insti	tutions, or other individuals.			
F Periods & Totals	+ Add Cost Sharing					
Rates	Period	Percentage	Source Account ⇒	mount \$	Unit Details	Actions
Personnel Costs	1 1: 09/01/2019 - 08/31/2020	0.00	600001	1,000.00	E Details	Q
Non-Personnel Costs	2 2: 09/01/2020 - 08/31/2021	0.00	600001	1,000.00	Details	Q
🗞 Subawards	3 3: 09/01/2021 - 08/31/2022	0.00	600001	1,000.00	E Details	Q
A Institutional Commitments	4 4: 09/01/2022 - 08/31/2023	0.00	600001	1,000.00	Details	Q
Cost Sharing	5 5: 09/01/2023 - 08/31/2024	0.00	600001	1,000.00	Details	Q
Unrecovered F & A				Total Allocated: 5,000.00 Total Unallocated: 0.00		
🗸 Modular 🕐						
Budget Notes						Reset to Default
Budget Summary						
			-			
			•			
		Back Save	Save and Continue Complete Bu	udget Close		

🛩 Data Validation (off) 🌣 Budget Settings 🗦 Hierarchy 👁 Summary 🔟 Budget Versions 😂 Autocalculate Periods 🗇 Help 🚽 **Budget Summary** « Return to proposal P3 (09/01/2021 - 08/31/2022) P4 (09/01/2022 - 08/31/2023) P1 (09/01/2019 - 08/31/2020) P2 (09/01/2020 - 08/31/2021) P5 (09/01/2023 - 08/31/2024) Totals F Periods & Totals Non-personnel Rates Calculated Direct Costs \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 Personnel Costs > Non-personnel Subtotal \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 Non-Personnel Costs Totals Subawards Total Direct Cost \$10,000.00 \$10,000.00 \$10,000.00 \$10,000.00 \$10,000.00 \$50,000.00 Institutional Commitments Total F&A Costs \$4,800.00 \$4,800.00 \$4,800.00 \$4,800.00 \$4,800.00 \$24,000.00 \$14.800.00 \$14.800.00 \$14,800.00 Totals Subtotal \$14,800.00 \$14,800.00 \$74.000.00 Project Income ✓ Modular 6 Budget Notes 🔳 Budget Sun Back Save Complete Budget Close

7. On the Budget Summary screen, click Complete Budget

8. Place a check mark in the box and click OK



9. From the Budget Summary screen, click Return to Proposal

					🛩 Data Valida	ation (off) 🌣 Budget Settings 👒	Summary Dudget Versions	Help +
	<	Budget Summary						
« Return to proposal			P1	P2	P3	P4	P5	
JF Periods & Totals			(09/01/2019 - 08/31/2020)	(09/01/2020 - 08/31/2021)	(09/01/2021 - 08/31/2022)	(09/01/2022 - 08/31/2023)	(09/01/2023 - 08/31/2024)	Totals
Rates		Non-personnel						
Personnel Costs		Calculated Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Non-personnel Subtotal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Non-Personnel Costs		Totals						
Subawards		Total Direct Cost	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$50,000.00
1 Institutional Commitments	>	Total F&A Costs	\$4,800.00	\$4,800.00	\$4,800.00	\$4,800.00	\$4,800.00	\$24,000.00
Project Income		Totals Subtotal	\$14,800.00	\$14,800.00	\$14,800.00	\$14,800.00	\$14,800.00	\$74,000.00
✔ Modular	C							
Budget Notes								
Budget Summary								

										✓ Data Validation	(on) 🖶 Print	Ф Сору	📰 Medusa	I≡ Hier	archy 🛛	Budget Version	ins 🖉	P Link	⑦ Help +
	<	(i) Document was success	fully saved.																х
🖹 Basics 🗸 🗸																			
👤 Key Personnel 🗸 🗸		Budgets																-	Add Budget
Personnel		The following budgets are linked	d to this proposa	al.															
 Compliance 		Name	Version	\$	Direct Cost	\$ F&A ≎		Total \$	St	tart \$	End	\$	Status	\$	Comme	nts	Act	tions	
N Attachments		My Budget (for submission)	1		50,000.00	19,200.00	1	69,200.00	12	2/01/2018	11/30/2023		Complete				Ac	tion v	
Questionnaire																			
عا Budget																			
Access																			
Supplemental Information																			
Summary/Submit																			
Super User Actions																			
Notifications History																			
						Back Save	s	Save and Continue	Clos	se									

NOTE: Each budget saved will appear on the **Budget** screen

Exercise 13-Marking Budget Version as 'Complete' and 'Final'

1. From the **Budget** screen, click the **Action** dropdown menu and select "Complete Budget"

[70] Durdmet Merel

									* Da	ita valiuatio	r (on) & Philit	@ Copy		s— mei		budget version	IS O'LIIIK	⊕ neih ∗
	Ocument was succes	ssfully saved.																х
🖹 Basics 🗸 🗸																		
1 Key Personnel 🗸	Budgets																	+ Add Budget
Personnel	The following budgets are linke	ed to this proposal.	District		F0.4		Tetel		C		F - 1		C+++		C			
✓ Compliance	Name My Budget	version a	50.000.00	¢	19 200 00	¢	10tal	Ŷ	Start 12/01/2018	¢	End	\$; Status	Ŷ	Comments		Actions	
N Attachments	(for submission)		50,000.00		19,200.00		09,200.00		12/01/2010		11/30/2023		Com				Action	
Questionnaire																		
D Budget																		
Access																		
Supplemental Information																		
Summary/Submit																		
La Super User Actions																		
Notifications History																		
					Back	Save	Save and Cont	tinue	Close									
										11								
				F	Action	s												
						_												
					Action	•												
				1														
					۹V	lew	Summ	ary										
					ΡhC	conv												
					ΞP	rint												
					⊠c	ome	olete B	udae	et 👍									22
																		23
Last	Updated 8/19/19						,	~										
Edot					✓R	lemo	ove fro	m S	ubmiss	ion								

OR

2.	While in the	Budget,	click	Complete	Budget
----	--------------	---------	-------	----------	--------

							✓ Data Validation (off) 🌣 Budget Settings 🛛 🗐 Hierar	chy @ Summary 回 Budget V	ersions 🛛 😂 Autocalculate Pe	riods 🗇 Help 🗸
C.	Periods & Totals	;								Recalculate with changes	leset to period defaults
E Periods & Totals	+ Add Budget Period										
Rates	Period Start Date *	Period End Date *	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit 0	Direct Cost Limit	Actions
Personnel Costs >	02/01/2019	01/31/2020	12.0	0.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0	.00
Non-Personnel Costs	02/01/2020	01/31/2021	12.0	0.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0	.00 🖹
N Subawards	02/01/2021	01/31/2022	12.0	0.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0	.00
\bigtriangleup Institutional Commitments \rightarrow	02/01/2022	01/31/2023	12.0	0.00	10,000.00	4,800.00	0.00	1,000.00	0.00	0	.00 🗎
Project Income			Total: 48.00	Total: 0.00	Total: 40,000.00	Total: 19,200.00	Total: 0.00	Total: 4,000.00	Total: 0.00	Total: 0.00	
🖌 Modular 🕑											
Budget Notes											
Budget Summary											
						7					
				Save	Save and Continue Complete	Budget Close					

3. Check the box for "Is this budget ready to be submitted to the sponsor?" and click OK

Is this budget complete?	×
Is this budget ready to be submitted to the sponsor?	
Cancel OK	

Exercise 14-Designating Access to Proposal

1. From the Access screen, click Add User

Kuali Research							
Proposal Development Proposal: #1 PI: Test User 01						Docu Doc I S2S (Initia Statu more	ment Info lbr: 3570 Connected: no tor: admin is: In Progress
			🛩 Data Validation (on) 🖶 Print	👁 Copy 🛛 📰 Medusa	a I≡ Hierarchy III Budget Version	s 🕜 Link	Help +
<	(i) Document was successfully saved.						х
Basics ~							
👤 Key Personnel 🗸 🗸	Permissions						
Personnel	L Add User						
 Compliance 							
Attachments	User Name	Roles		Actions			
Questionnaire	admin	Aggregator Document Level		Edit Del	ete		
D Budget							
Access							
Supplemental Information							
Summary/Submit							
Super User Actions							
Notifications History							
		Back Save Save and Continue Close					

2. On the Add Permission screen, enter Personnel details and click Continue

Add Permission		×
Last Name	Cole	
First Name		
User Name		
Email Address	user@domain.com	
Office Phone		
Home Unit		Q
Campus Code		Q
	Continue	

3. Select the correct name and click Continue

Add Permissi	on							×
Only the top 200 re	sults were	returned. If you canno	ot find what you a	re looking for, please refine the s	ea	rch criteria		
≎ Full Name:	User ID;	Email Address: 💠	Unit Number:≎	Unit Name:	\$	Organization:	≎ City:	\$
Jennifer Cole	jrc0034	jrc0034@uah.edu	131001	Athletics		Athletics	Campu	IS
Kenya Cole	colek	colek@uah.edu	600009	Office of Sponsored Programs		Office of Sponsored Programs	Campu	IS
Showing 1 to 2 of 2	entries					First Previous 1	Next La	ist
			Continue					

4. Select the appropriate role and click Add Permission

Add Permission	×
Assign a role	
Aggregator Only Document Level	
✓ Budget Creator Only Document Level	
approver Document Level	
Viewer Document Level	
Budget Creator Document Level	
Narrative Writer Document Level	
Aggregator Document Level	
Access_Proposal_Person_Institutional_Salaries Document Level	
Delete Proposal Document Level	
View Institutionally Maintained Salaries Document Level	
Add Permission	

5. Click Save and Continue

	 Answer questions as they relate to the project Click Save and Continue 							1.
	3. Olick dave and obliting	🛩 Data Validation (off) 🖶 Print	Ф Сору	Medusa	i≡ Hierarchy	Budget Versions	S Link	⑦ Help ~
	Supplemental Info							
Basics	O Document was successfully saved.							
Key Personnel	>							
Compliance	Additional Project Data							
Attachments	Additional Project Data							
Questionnaire	Includes New Curriculum: "							
Budget	○ Yes ● No							
Access								
Supplemental Information								
Summary/Submit								
Super User Actions								
Notifications History								

Back Save Save and Continue

Exercise 16–Validating and Submitting Proposal

1. On the Summary/Submit screen, Select Data Validation

		✓ Data Validation (o	n) 🖶	🖾 Budget Versions 🔗 Link 💿 Help 🗸
<	Permissions			
Basics >	L Add User			
L Key Personnel >				
✓ Compliance	User Name	Roles		Actions
N Attachments	admin	Aggregator Document Level		Edit Delete
Questionnaire	colek	Budget Creator Only Document Level		Edit Delete
Budget				
Access				
Supplemental Information	_			
Summary/Submit				
🍰 Super User Actions				
Notifications History				
		Back Save Save and Continue Close		

2. In the Data Validation window, click the Turn On button

Data Validation		Turn On
Data Validation is currently off.		
	Close	
	Cluse	

- 3. Review the displayed Errors/ Warnings
- 4. Click the Fix It link for each of the Errors/Warnings
- 5. Correct the Errors as necessary. Proposals can be submitted with Warnings, but not Errors

				Turn O
ŝ	Search:			
Section \$	Description	\$	Severity \$	Aion
	The Investigators are not all certified. Please certify Test User 04.		Error	Fix It
Additional Project Data	Includes New Curriculum is a required field.		Еггог	Fix It
	Sponsor deadline date has not been entered.		Warnings	Fix It
	Section ≎ Additional Project Data	Section Constraints Description Section Description The Investigators are not all certified. Please certify Test User 04. Includes New Curriculum is a required field. Includes New Curriculum is a required field. Sponsor deadline date has not been entered.	Section Description Image: Section of the Investigators are not all certified. Please certify Test User 04. Additional Project Data Includes New Curriculum is a required field. Image: Sponsor deadline date has not been entered.	Section Description Severity ≎ Includes New Curriculum is a required field. Error Includes New Curriculum is a required field. Error Sponsor deadline date has not been entered. Warnings

6. On the Summary/ Submit screen, click Submit for Review

K	Kuali Research									
	✓ Compliance	Saved			Routing		Approved		*	
Q	Notachments									
	Questionnaire									
-	Budget	Proposal Summary	Personnel	Compliance	Attachments	Questionnaire	Supplemental Info	Keywords	Budget Summary	
e,	Access	Proposal Sum	mary							
	Supplemental Information	Title			My Importa	My Important Project-O.S.P				
	🕞 Summary/Submit	Principal Investigator			Nicholas Lo	Nicholas Loyd				
		Lead Unit			233100 - C	233100 - Civil and Environmental Engineering				
	M Super User Actions	Activity Type			Research -	Applied				
	Notifications History	Proposal Number			75					
Ø		Project Start Date			09/01/2019					
(i)		Project End Date			08/31/2024					
da		Include Subaward(s)?			Yes					
$\mathbf{\circ}$		Sponsor Name			National Ins	stitute of Health				
\odot		Sponsor Deadline Date			08/05/2019					
		Sponsor Deadline Type			Receipt					
>	\rightarrow	Submit for Review	Ad Hoc Recipie	nts View Rou	te Log Cancel	proposal More A	ctions - Close			· .

7. Select Yes for future approvals if you would like to receive notifications for all approvals.

K	Kuali Research		
	Guestionnaire Budget	Proposal Summary Personnel Please Se	Lect × s Supplemental Info Keywords Budget Summary
م م	Access	Proposal Summary Do you want requests?	o receive future approval
	Supplemental Information	Title	2
Ð	🕩 Summary/Submit	Principal Investigator	No Yes
		Lead Unit	mental Engineering
	Super User Actions	Activity Type	Research - Applied
	Notifications History	Proposal Number	75
		Project Start Date	09/01/2019
		Project End Date	08/31/2024
~		Include Subaward(s)?	Yes
ଡ		Sponsor Name	National Institute of Health
i		Sponsor Deadline Date	10/01/2019
(1)		Sponsor Deadline Type	Receipt
Ŭ		View Ro	ute Log Actions *
\odot		Submit for Review Ad Hoc Recipients	Close
`			· · · · · · · · · · · · · · · · · · ·

Exercise 17–Searching for Proposals

1. From the side menu, select Common Tasks tab and click Search for Proposals

Quick Links	Award	COI	Institutional Proposal	Negotiation			
Action List @ Doc Search @ Current & Pending Support	All My Awards Create Award Search Awards	My Disclosures	Create Institutional Proposal Create Proposal Log Search Institutional Proposals	All My Negotiations Create Negotiation Search Negotiation			
Person Training View S2S Submissions Locks			Search Proposal Logs				
Proposal Development		Subaward	I				
All My Proposals		Create St	Create Subaward				
Create Proposal		Search S	Search Subawards				

28

2. In the Development Proposal Lookup, enter the Proposal Number or perform a Search

Development Proposal Lookup		
Proposal Number:	-4	
Proposal Type:	select v	
Proposal State:	select 🔻	
Project Title:		
Proposal Person:		۹
Principal Investigator:		٩
Aggregator:		Q
Participant:		۹
Initiator Username:		٩
Sponsor Deadline Date:		to 📰
Sponsor:		۹
Sponsor Name:		
Lead Unit:		۹
Lead Unit Name:		
Award ID:		
Opportunity ID:		
Hierarchy Status:	· · · · · · · · · · · · · · · · · · ·	
Proposal Create Date:	to to	THE STATE
Cancel Clear 1	/alues Search	

3. Choose to View, Edit, or Copy proposal from search results. Medusa will allow the user to see how one proposal is related to any others.

	Caroli Caroli Caroli Sand																
aw 10 🔻 entries	_																cav and the
ations	posal Number	Proposal Document Number 0	Proposal Type 0	Proposal Blate	Project Title 0	Prev Grants.Gov Tracking ID	Opportunity ID 🔅	Opportunity Title 🕴	Agency Routing Identifier	8ponsor Name 0	Principal Investigator 0	Lead Unit 🔅	Lead Unit Name	8ponsor Deadline Date	Opportunity ID	Hierarchy Status	Proposal Create Date
iew copy medusa		3570	Nov	Approval Granted	Tite					National Institute of Health	Test User 01	200047	Intensive Language and Culture Program	10/05/2019		Not in a hierarchy	11052018 11:17 AM
iew edit copy medusa		3655	Nov	In Progress	Testing Title					National Institute of Health		220002	College of Business Administration			Not in a hierarchy	01/28/2019 02:02 FM
iew edit copy medusa		3705	Nov	In Progress	Demoing COI					National Institute of Health	admin admin	222001	Economics			Not in a hierarchy	02/11/2019 11:09 AM
iew copy medusa		3747	Nov	Approved and Submitted	SMVP TEST Proposal 1					Alabama Department of Commerce	Test User 01	820001	Systems Management and Production Center	03/01/2019		Not in a hierarchy	02/15/2019 02:11 PM
iew copy medusa		3881	Nov	Approved Post-Submission	SMPS TEST 2					ITT Aerospace Controls	Test User 01	820001	Systems Management and Production Center			Not in a hierarchy	02/25/2019 10:32 AM
iew copy medusa		3883	Nov	Approved and Bubmitted	SMVP Test 3					Jacobs Engineering Group	Test User 01	820001	Systems Management and Production Center			Not in a hierarchy	02/25/2019 10:40 AM
iew copy medusa		3890	Nov	Approved Post-Submission	ITSC Test					Husqvama Group	Test User 01	750001	Information Technology and Systems Center	02/28/2019		Not in a hierarchy	02/25/2019 11:06 AM
iew copy medusa		3897	Now	Approved and Submitted	VP Research					Google.org	Test User 01	600001	VP for Research and Economic Development	02/01/2020		Not in a hierarchy	02/25/2019 11:22 AM
iew copy medusa		3903	Now	Approved and Submitted	OIT TEST					HudsonAlpha Institute for Biotechnology	Test User 01	304001	Office of Information Technology	03/01/2019		Not in a hierarchy	02/27/2019/01/20 PM
iew copy medusa		3910	Now	Approved Post-Submission	Test for adding personnel					National Science Foundation	Test User 04	234100	Electrical and Computer Engineering	03/01/2019		Not in a hierarchy	02/28/2019 02:25 PM
	tal entries)															Det Do	ing 1 2 2 4 5 Med Last

Exercise 18-Recalling/ Returning a Proposal

1. On the Summary/ Submit screen click Return or Recall

K	Kuali Research										
	Key Personnel >		· · · · · · · · · · · · · · · · ·	•							
0	✓ Compliance										
	Notachments	Proposal Summary Personnel (Compliance Attachments Questionnaire Supplemental Info Keywords Budget Summary								
	Questionnaire	Proposal Summary									
	Budget	Title	My Important Project-O.S.P								
	Access	Principal Investigator	Nicholas Loyd								
	Supplemental Information	Lead Unit	233100 - Civil and Environmental Engineering								
	C	Activity Type	Research - Anniled								
	Summary/Submit	Proposal Number	75								
	Super User Actions	Project Start Date	09/01/2019								
0	Notifications History	Project End Date	08/31/2024								
(i)	Notifications mistory	Include Subaward(s)?	Yes								
ds		Sponsor Name	National Inst								
0		Sponsor Deadline Date	10/01/2019								
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		Send Adhoc Ad Hoc Recipients	Return View Route Log Recall Submit to Sponsor More Actions - Close								
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2. Enter a reason in the box and click OK

Please Select	×
Are you sure document? Required Return Reason:	
1	
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Choose File No file chosen	
OK Cancel	

Exercise 19–Approving the Proposal

1. From the Kuali Dashboard, click You're up!

KUALI RESEARCH	Dashboard			Show/hide cards
 Dashboard Home Search Common Tasks All Links 	Proposals routing to me You're upl Messervy; National Institute of Health; My Important Proje Due: 10/05/19 Last action: Rodgers, Jessica; 8/15/1910	Sort by V Propo cc; Proposal No: 88; PI: Stev 2:50 AM < >	osals not routing	Sort by 🗸
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	Post award in progress & negotiations			Sort by 💙
 Help About Logout Messervy, Steven Switch Apps Collapse Menu 		All Clear!		

2. Scroll to the bottom of the Summary/ Submit page and click Approve

KUALI RESEARCH	Kuali Research			
Dashboard Home	PI: Steven Messervy			Initiator: mccombj Status: Approval Pending
Q Search				more
🕝 Common Tasks			🛩 Data Validation (off) 🖶 Print 🗼 Copy 📰 Medusa 💿 Budget Vers	ions 🔗 Link 💿 Help 🗸
GÐ All Links	٢.	Submit		
	Basics >			
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	Attachments	Proposal Summary Personnel Compliance Attachme	ents Questionnaire Supplemental Info Keywords Budget Summary	
	Questionnaire	Proposal Summary		
	Budget			
		Title		
	Access	Principal Investigator	Steven Messervy	
	Supplemental Information	Lead Unit	233100 - Civil and Environmental Engineering	
	Summary/Submit	Activity Type	Research - Applied	
		Proposal Number	88	
	Notifications History	Project Start Date	08/01/2019	
🕜 Help 🛛 🗹		Include Subaward(s)?	No	
		Sponsor Name	National Institute of Health	
G About		Sponsor Deadline Date	10/05/2019	
ப் Logout		Sponsor Deadline Type	Receipt	
🐼 Messervy, Steven 🛛 🗹				
III Switch Anne		Approval signifies that the proposed project fits the academic france people, contributions listed will be met by the department/college unless	mework and resources or the unit, requirements for new or renovated facilities/space have been di s otherwise approved, that Conflict of Interest requirements have been addressed, and that Spons	scussed with the appropriate ored Programs may process the
		proposal.	View Route Log More Actions -	
< Collapse Menu		Send Adnoc Ad Hoc Recipients Approve Return	Close	

3. Add comment or upload an attachment if needed, this is optional. Click **OK** to approve

Please Select	×
Are you sure you want to approve this document?	
l	4
Attachment: Choose File No file chosen	
OK Cancel	

4. Approval is complete and the screen will return to the **Summary/Submit** page. Click **Close** to exit back to the Dashboard

KUALI RESEARCH	Kuali Research				
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	Access	Proposal Summary			
	Supplemental Information	Title	My Important Project- JR		
	🗘 Summary/Submit	Principal Investigator	Steven Messervy		
	Notifications History	Lead Unit	233100 - Civil and Environmental Engineering		
	_	Activity Type Proposal Number	Research - Applied		
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		Project End Date	08/31/2024		
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(U Logout		Sponsor Name	National Institute of Health		
⊘ Messervy, Steven		Sponsor Deadline Date	10/05/2019		
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