

AN INTRODUCTION TO KUALI

MARQUETTE UNIVERSITY'S NEW GRANT MANAGEMENT SYSTEM

Office of Research and Sponsored Programs
April 2018

Today's Goals

1. Learn what Kualu is.
2. Learn what Kualu is going to do.
3. Learn how you will interact with Kualu.
4. Understand how Kualu will work with current systems.

Kuali at Marquette

- Kuali is a web-based grant management system used for:
 - Submitting applications
 - Viewing award information
 - Monitoring contract negotiations
 - Disclosing financial conflicts of interest
 - IRB protocols & IACUC protocols

Kuali Timeline for Roll Out and Use:

1. Award Module – Spring 2017
2. Application Module – Winter 2018
3. Conflict of Interest Module – Winter 2018
4. IRB Module – TBD
5. IACUC Module – TBD
6. Testing and development of all Modules is ongoing

Benefits to users:

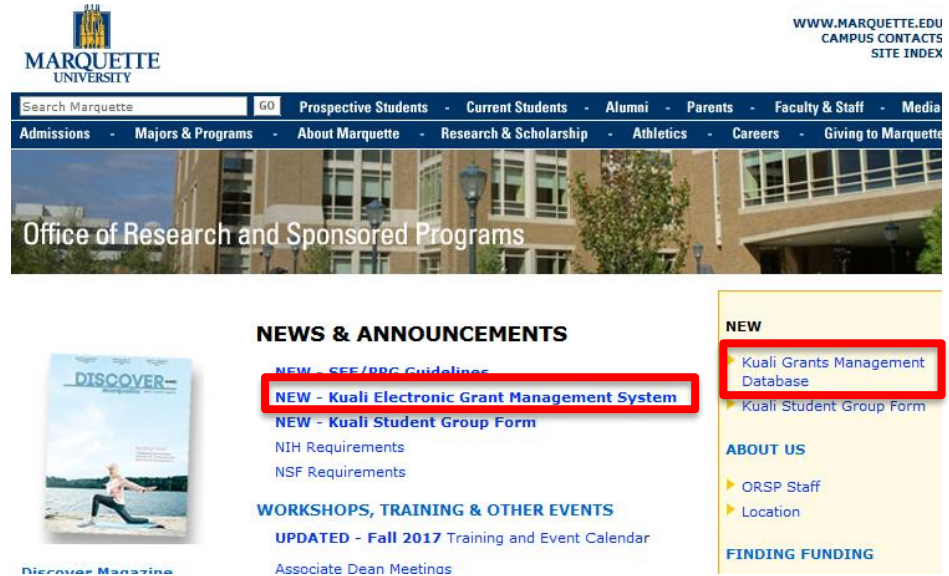
- All research related information stored in one system!
- Award information available and easy to view, including high level award balances and reporting requirements.
- Electronic routing process and system to system application submission.
- Electronic disclosure of financial interest.

Key Takeaways:

1. Use of Kualu will be required for all external grant applications.
2. PIs will need to log-into the system and complete some information for each application.
3. Substantially complete applications will need to be electronically routed 3 business days before the sponsor deadline.
4. You can always contact ORSP for questions about Kualu!

Accessing Kuali:

- You will log-in to Kuali using your MU Username and Password.
- You can access Kuali through the ORSP Website or the ORI Website:
 - www.Marquette.edu/orsp
 - <http://www.marquette.edu/innovation/kuali-about.php>
- Or at grants.mu.edu



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Office of Research and Sponsored Programs

NEWS & ANNOUNCEMENTS

NEW - [SEE/PRG Guidelines](#)
NEW - [Kuali Electronic Grant Management System](#)
NEW - [Kuali Student Group Form](#)
NIH Requirements
NSF Requirements

WORKSHOPS, TRAINING & OTHER EVENTS

UPDATED - [Fall 2017 Training and Event Calendar](#)
[Associate Dean Meetings](#)

NEW

[Kuali Grants Management Database](#)
[Kuali Student Group Form](#)

ABOUT US

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FINDING FUNDING

Discover Magazine

Welcome,

Search Tasks

Proposals

- Create Proposal
- Proposals Enroute
- All My Proposals
- Create Proposal For S2S Opportunity

Lists

- Search Proposals
- View S2S Submissions
- Search Proposal Log
- Search Institutional Proposals

Awards

- All my Awards

Negotiations

- All My Negotiations

IRB Protocols

Actions

- Create IRB Protocol
- Amend or Renew IRB Protocol
- Notify IRB on a Protocol
- Request a Status Change on a IRB Protocol

Lists

- Pending Protocols
- Protocols Pending PI Action
- Protocols Pending Committee Action
- Protocols Under Development
- All My Protocols
- Search Protocols
- All My Reviews
- All My Schedules

Conflict of Interest

- COI Dashboard

IACUC Protocols

Actions

- Create IACUC Protocol

Lists

- All My Protocols
- Search Protocols
- All My Reviews
- All My Schedules

Quicklinks

- Pessimistic Lock
- Grants.gov Opportunity Lookup
- Reporting

Personnel

- Current & Pending Support

Workflow

- Preferences

Usability

- Researchers and Unit Administrators will be able to create proposals, view awards and interact with the conflict of interest module.
- ORSP will manage the behind the scenes information.
- Kualii will not replace the financial systems at MU, but will share information back and forth with them.

Proposal Development

- All external grant applications will be submitted through Kualu.
- Proposal information, documents, budgets and other information will be stored in the system and for some federal agencies, be submitted directly through the system.
- PIs will need to create proposals and enter several key pieces of information needed to assist ORSP with further proposal development.
 - Basic opportunity information (including deadline/due date if known)
 - Key personnel
 - Questions about the project
 - Certification
 - COI

Proposal Routing/Approval

- All approvals happen through Quali – No More Paper Forms!!!
- Routing must begin **3 business days** before sponsor deadline.
- To submit into routing all required proposal fields must be complete and substantially complete drafts of all documents/attachments must be uploaded.
 - Final versions of proposal documents may be modified after routing – no other changes may be made.

Proposal Routing/Approval Cont.

- Routing Process:
 - ORSP gives initial approval.
 - PIs, Chairs and Deans approve next – and can approve simultaneously – no hierarchy in this approval chain.
 - Chairs and Deans of PIs, Co-Is and Key Personnel will need to approve as well at this stage.
 - ORSP gives final approval and submits application or allows submission by the PI.
 - *If additional approval is required (ex. IT Services), ad hoc review will be requested and approval will be required before moving to the PI/Chair/Dean level.

After Submission

- You will be able to view all proposal documents in the system at any time.
 - PIs will have access to whole application – Co-Is and Key Personnel will have access to all but the budget.
- You can view the status of all applications and if an award is made, the status is changed and an award is created.
- You will be notified of awards in the same way you are now.
- Award set-up will hopefully be more efficient since the information is already in the system and is carried over from the proposal development application.

Awards

- The Award Module is used to store detailed information for Awards.
- It includes a complete history of changes made to Awards from the notice of award through closeout.
- ORSP will create and maintain the Award Documents.
- Researchers and department/college administrators can view Award information for their grants or their department/college grants, respectively.

Negotiations

- Quali will allow more visibility and transparency surrounding the contract negotiation process.
- Communication will be documented in the system.
- Sponsor and sub-award agreements will be stored in the award/sub-award module.
- Other agreements including non-disclosure agreements and material transfer agreements will be stored in the system as well.

Conflict of Interest

- Disclosures and management of financial interests will be done electronically in Kualu.
- You will need to update your information at the time of application, as any awards are made and then on a yearly basis.
 - This will be required for all key personnel before an application can move into the routing system.
- The system stores all of your financial entities and project declarations.

Reporting

- You will be able to run a series of reports through the Kuali system.
- The reporting module is available to everyone so you will be able to generate comparative reports as well.
- Previously, reporting was limited to ORSP generated monthly and yearly reports, so this will be a great benefit to the MU Community.

Training

- Training materials are available on the Kualii webpage.
- Training is available through brown bag sessions and to individual departments or groups by request.
- Training will also be available individually on an as needed basis.

In Conclusion

- Kuali is the new system that grant information will be processed through and stored in.
 - It is not replacing the existing financial systems on campus.
 - Information will move from one module to the next, eliminating the need for data re-entry.
- All of campus will be using the system by July 2018.
 - Make sure you plan ahead for upcoming grant applications and schedule time for learning how to use the system into your grant preparation timeline.
- Each PI will need to use the system to answer some basic questions and certifications. All key personnel will need to update their COI declaration.
- Applications will need to be submitted for routing 3 business days before the sponsor deadline.

Questions???

○ Contact ORSP

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