

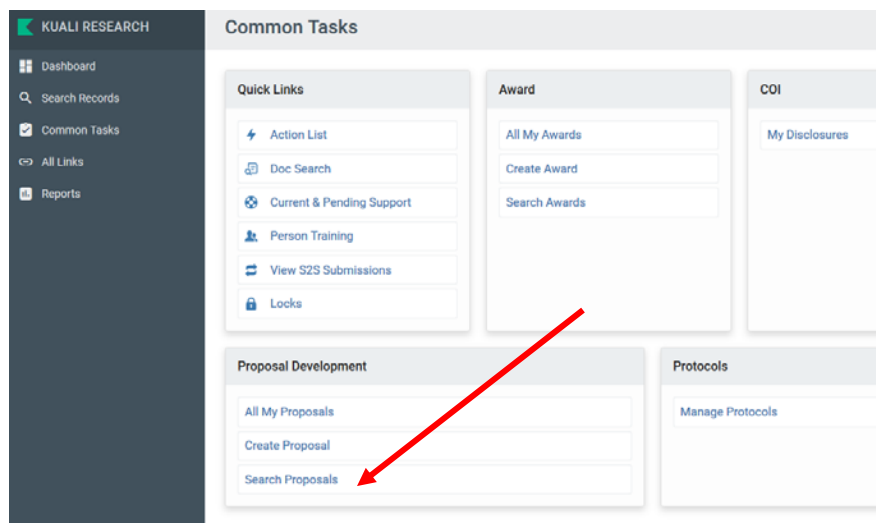
Approving an Application in KualI

September 2020

Purpose: To understand the process for approving an application in the KualI Proposal Development module.

You can approve proposals through an email link sent via the KualI system, by using your Dashboard in KualI or by searching directly for the proposal.

1. When a proposal has been submitted into routing, all people identified as needing to approve the application (PI and Multiple PI (if applicable), PI's Chair and Dean, other Key Personnel's Chair and Dean, and others as applicable) will receive an email generated from the KualI system alerting you to the need for action on a proposal. Click directly on the link in the email and it will take you to the proposal summary screen (image below). You can navigate through the tabs (**Proposal Summary, Personnel, Compliance, Attachments, etc.**) to see the application information.
2. To approve by searching directly, enter "search proposals" on the main KualI Common Tasks screen.

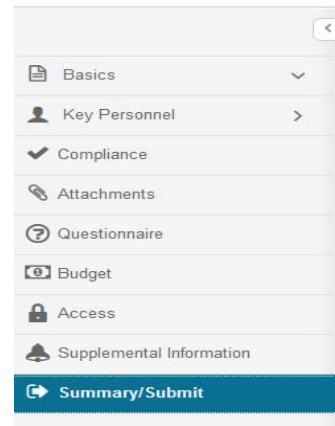


Next, enter search criteria, limit your search to only one data element (proposal number or last name of PI work well).

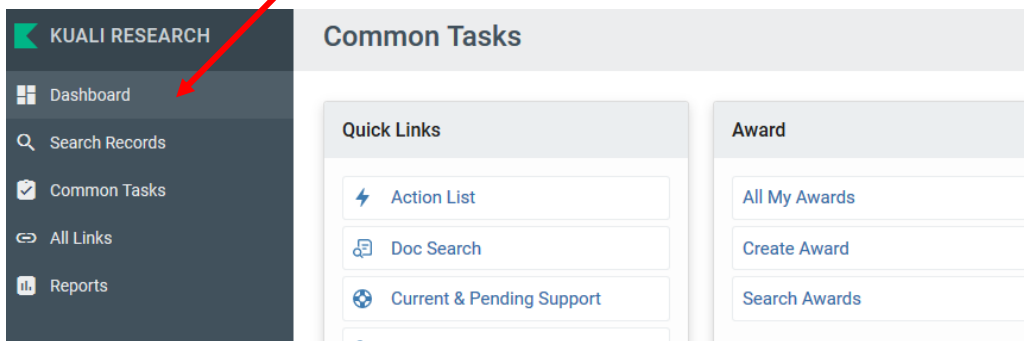
Development Proposal Lookup

Proposal Number:	<input type="text"/>
Proposal Type:	<input type="text" value="select"/>
Proposal State:	<input type="text" value="select"/>
Project Title:	<input type="text"/>
Proposal Person:	<input type="text"/> <input type="button" value="📄"/> <input type="button" value="🔍"/>
Principal Investigator:	<input type="text"/> <input type="button" value="📄"/> <input type="button" value="🔍"/>

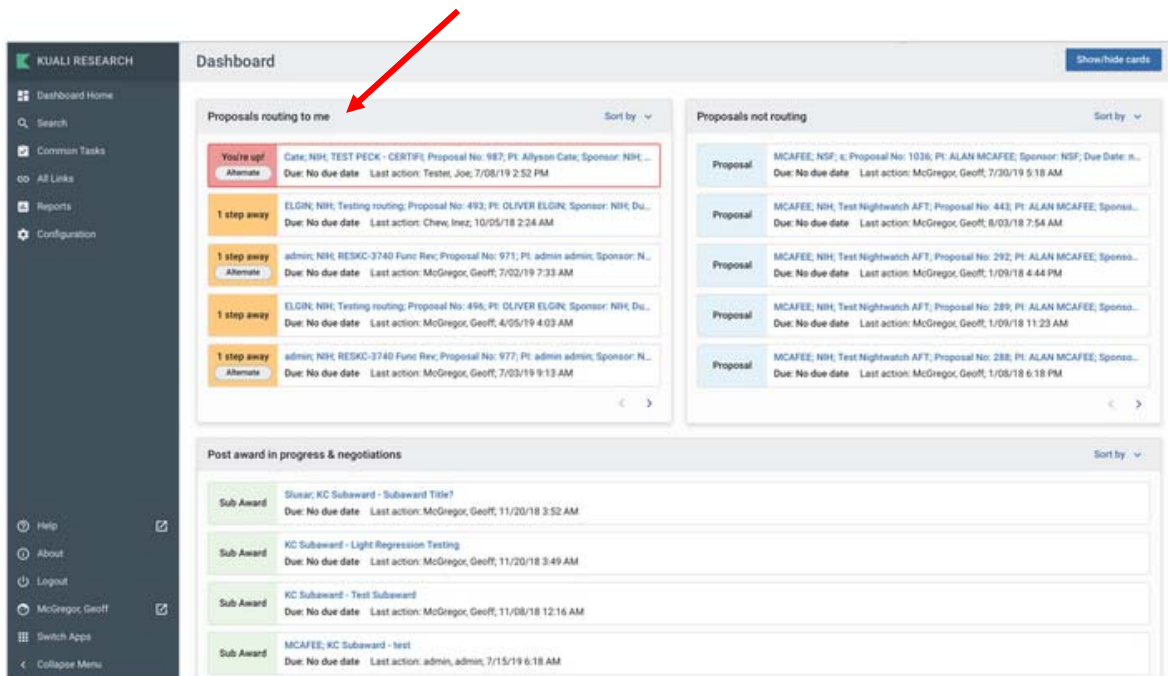
Click ENTER or “search” at the bottom of the screen. Search results appear at the bottom of the page, find the proposal you are looking for and click “view.” The proposal will open and you will need to go to the “summary/submit” screen, which can be found using the navigation panel on the left side of the screen



- To approve using the Dashboard to find a proposal, from the KualI Common Tasks screen, click on DASHBOARD in the upper left corner.



From the Dashboard screen, go to the Proposals Routing to Me card, which should be the first card on the page.



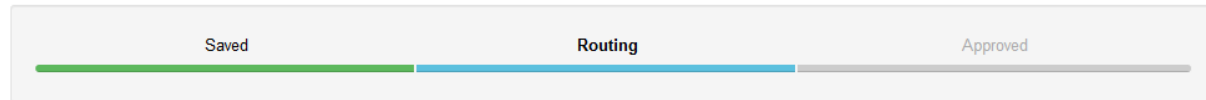
Locate the proposal that needs your approval – proposals awaiting your immediate approval will appear with a RED “You’re Up” label next to them. You can click on the row in the card to open the record and take the necessary action – the proposal will open in the summary/submit screen for that particular application.

Proposals routing to me		Sort by
You're up! Alternate	Proposal #1436 – PI: POND, MITZI – Sponsor: NIH – Title: cost share routing test – Lead unit: IN-C... Due date: None Last action: Administrator, Application, 6/16/20 9:51 AM	
You're up! Alternate	Proposal #1439 – PI: Tester, Joe – Sponsor: NIH – Title: NEW NIH FormsF test R01 s... – Lead unit... Due date: None Last action: McGregor, Geoff, 6/16/20 11:14 AM Compliance	
You're up! Alternate	Proposal #1453 – PI: MARTIN, AUDREY – Sponsor: NIH – Title: Phoenician Shipping Vesse... – Le... Due date: None Last action: McGregor, Geoff, 7/21/20 8:03 PM Compliance	
You're up! Alternate	Proposal #1467 – PI: Cate, Allyson – Sponsor: NASA - Washington – Title: test 424a PECK – Lead ... Due date: None Last action: McGregor, Geoff, 7/07/20 5:25 PM	
1 step away Alternate	Proposal #971 – PI: admin, admin – Sponsor: NIH – Title: RESKC-3740 Func Review – Lead unit: L... Due date: None Last action: McGregor, Geoff, 7/02/19 2:33 PM	

6-10 of 176 < >

4. Approval from the SUMMARY/SUBMIT SCREEN:

Submit



- Proposal Summary
- Personnel
- Compliance
- Attachments
- Questionnaire
- Supplemental Info
- Budget Summary

Proposal Summary

Title	Kuali Demo Application
Principal Investigator	Erin Folstad
Lead Unit	385 - Research and Sponsored Programs
Activity Type	Research
Proposal Number	130
Project Start Date	03/01/2018
Project End Date	02/28/2019
Include Subaward(s)?	No
Sponsor Name	Earhart Foundation
Sponsor Deadline Date	02/16/2018
Sponsor Deadline Type	

Principal Investigator (PI) and/or Multiple PI: Your approval indicates that you have read and approved the application or proposal, budget, and commitments made therein. Chair(s): Your approval indicates that you approve the proposed activity, department personnel, and department commitments. Dean(s): Your approval indicates that you approve the proposed activity, college or school personnel, and college or school commitments.

- Send Adhoc
- Ad Hoc Recipients
- Approve
- Return
- View Route Log
- Recall
- More Actions
- Close

The proposal documents (narrative, budget justification, facilities, etc.) will be found under the **Attachments** tab. Within the Attachments tab, documents will be uploaded to one of three tabs, Proposal, Personnel and/or Internal. For system to system applications (to federal sponsors submitted through grants.gov), the documents will be found under the **Proposal** and **Personnel** tabs. For all other applications, the documents will be found under the **Internal** tab. Click on the File name to view the document.

Progress bar: Saved (green), Routing (blue), Approved (grey)

Navigation tabs: Proposal Summary, Personnel, Compliance, **Attachments**, Questionnaire, Supplemental Info, Budget Summary

Attachments

Proposal (0) Personnel (0) Abstracts (0) **Internal (1)** Notes (0)

Internal (1)

File	Type *	Status	Description	Uploaded By	Posted Timestamp
1 All Application Documents - Demo.pdf	Other	Complete	All application documents being submitted to the sponsor.	Folstad, Erin	02/16/2018 11:38 AM

Any commitments being made on behalf of the department or college or special considerations for the project can be found under the **Supplemental Info** tab.

Progress bar: Saved (green), Routing (blue), Approved (grey)

Navigation tabs: Proposal Summary, Personnel, Compliance, Attachments, Questionnaire, **Supplemental Info**, Budget Summary

Supplemental Info

Commitments

Commitments 1. The sponsor does not allow Indirect Costs. 2. The PI will devote effort as needed to oversee the project as proposed. 3. The department is committing X number of graduate tuition credits for the GRA working on the project.

A summary of the proposed budget for the project can be found under the Budget Summary tab.

Progress bar: Saved (green), Routing (blue), Approved (grey)

Navigation tabs: Proposal Summary, Personnel, Compliance, Attachments, Questionnaire, Supplemental Info, **Budget Summary**

Budget Summary

Cost Sharing Amount:	0.00	Underrecovery Amount:	0.00
Program Income:	0.00	F&A Rate Type:	MTDC

	P1(03/01/2018 - 02/28/2019)	Totals
Personnel		
> Salary	\$2,540.93	\$2,540.93
> Fringe	\$724.17	\$724.17
Calculated Direct Costs	\$0.00	\$0.00
Personnel Subtotal	\$3,265.10	\$3,265.10
Non-personnel		
> Travel	\$250.00	\$250.00
> Other Direct	\$1,000.00	\$1,000.00
Calculated Direct Costs	\$0.00	\$0.00
Non-personnel Subtotal	\$1,250.00	\$1,250.00
Totals		
Total Direct Cost	\$4,515.10	\$4,515.10
Total F&A Costs	\$2,302.70	\$2,302.70
Totals Subtotal	\$6,817.80	\$6,817.80

Following review of the proposal, you can either approve the application or return it. To approve, simply click the **Approve** button. To request modifications, click the **Return** button and the proposal will bounce back to ORSP for changes. The proposal will then be re-routed for approval following modifications. All individuals who have previously approved will need to do so again. The **View Route Log** tab shows where in the routing/approval process the proposal currently is and what other actions have been taken.



- Proposal Summary
- Personnel
- Compliance
- Attachments
- Questionnaire
- Supplemental Info
- Budget Summary

Proposal Summary

Title	Kuali Demo Application
Principal Investigator	Erin Folstad
Lead Unit	385 - Research and Sponsored Programs
Activity Type	Research
Proposal Number	130
Project Start Date	03/01/2018
Project End Date	02/28/2019
Include Subaward(s)?	No
Sponsor Name	Earhart Foundation
Sponsor Deadline Date	02/16/2018
Sponsor Deadline Type	

Principal Investigator (PI) and/or Multiple PI: Your approval indicates that you have read and approved the application or proposal, budget, and con therein. Chair(s): Your approval indicates that you approve the proposed activity, department personnel, and department commitments. Dean(s): Y that you approve the proposed activity, college or school personnel, and college or school commitments.

- Send Adhoc
- Ad Hoc Recipients
- Approve
- Return
- View Route Log
- Recall
- More Actions ▾
- Close