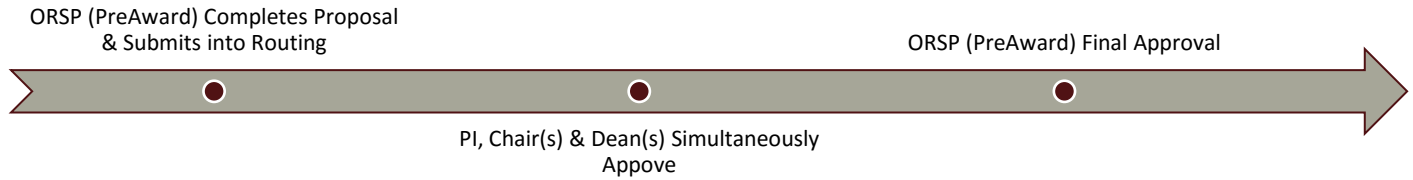


Approving Routing using Kualii Action Email

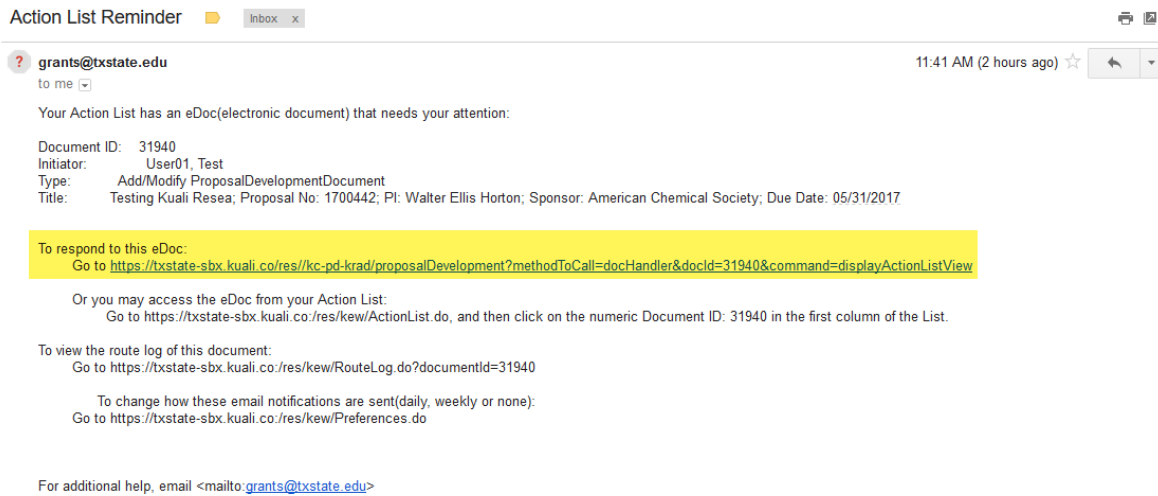
Texas State Kualii Routing



Kualii Proposal Routing Review & Approval – Email Notification

STEP 1: EMAIL NOTIFICATION

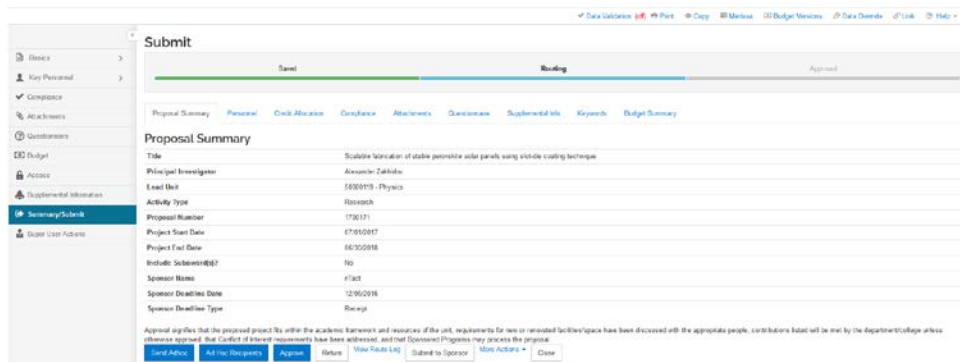
To access a proposal for review and approval via the email notification process, open email notification navigate down to “To respond to this eDoc”



STEP 2: PI/CHAIR/DEAN REVIEW

The link will navigate to Summary/Submit tab, with a summary of each proposal section across the summary screen. The following sections are available for review:

- ✓ Proposal Summary
- ✓ Attachments
- ✓ Personnel
- ✓ Questionnaire
- ✓ Credit Allocation
- ✓ Supplemental Info
- ✓ Compliance
- ✓ Keywords



Approving Routing using KualI Action Email

STEP 3: APPROVE OR RETURN

Once proposal has been reviewed and is ready for approval, click on Approve at bottom of screen. Or, if a proposal is incorrect or needs revisions, click on Return. This will send the proposal back to ORSP, PreAward for further action.

The screenshot shows a 'Submit' form with a progress bar at the top indicating 'Saved', 'Routing', and 'Approved' stages. Below the progress bar are tabs for 'Proposal Summary', 'Personnel', 'Credit Allocation', 'Compliance', 'Attachments', 'Questionnaire', 'Supplemental Info', and 'Keywords'. The 'Proposal Summary' section contains the following information:

Title	Testing KualI Research
Principal Investigator	Walter Ellis Horton
Lead Unit	5000070 - Office of the Assoc. VP for Res
Activity Type	Research
Proposal Number	1700441
Project Start Date	01/01/2018
Project End Date	12/31/2018
Include Subaward(s)?	No
Sponsor Name	NIH-National Institute of Mental Health
Sponsor Deadline Date	05/31/2017
Sponsor Deadline Type	

At the bottom of the form, there are buttons for 'Save And Exit', 'Add New Recipients', 'Approve', 'Return', 'View Route Log', 'More Actions', and 'Close'. Two red arrows point to the 'Approve' and 'Return' buttons.

To View Route Log of Past, Current and Pending Approvers

Click on View Route Log

Actions Taken denote past approvers/approvals

Pending Action Requests denote current approvals pending PI/Chair/Dean Action

Future Action Requests denote future approvals once pending approvals have completed

The 'Route Log' page displays the following information for proposal ID 31939:

Title	Testing KualI Resea; Proposal No: 1700441; PI: Walter Ellis Horton; Sponsor: NIH-National Institute of Mental Health; Due Date: 05/31/2017			
Type	Proposal Development Document	Created	09:06 AM 05/08/2017	
Initiator	User01, Test	Last Modified	02:34 PM 05/08/2017	
Route Status	ENROUTE	Last Approved		
Document Status		Document Status Modified		
Node(s)	PeopleFlows, JoinCostShare	Finalized		

Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	User01, Test		09:07 AM 05/08/2017	
COMPLETED	User01, Test		02:34 PM 05/08/2017	

Pending Action Requests

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Horton, Walter Ellis	02:34 PM 05/08/2017	Role: KC-WKFLW PI from PeopleFlow Name: Proposal Development Standard Workflows