

# Kuali Research 6.0

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PART II: PROPOSAL CREATION – ADDITIONAL SPONSOR INFORMATION

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# Adding Sponsor Info to Your Proposal

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While you are creating a proposal in Kualu you can also add the following for ORSP to review:

- Delivery: Who (ORSP-PreAward or PI) will be submitting the proposal
- Opportunity ID: Unique identifier for the proposal
- Opportunity Title: Specific Title of Sponsored Project you are applying under
- Guidance Document Upload: A PDF/Word/Other version of your guidance

To enter this information, you will also need to scroll to the following tabs:

- **Basics/Delivery Info**
- **Basics/Sponsor & Program Information**
- **Attachments**

# Adding Sponsor Information: Delivery Info

**Kuali** RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

Proposal Development  
**Proposal: #1700442**  
PI: *Walter Ellis Horton*

Document Info  
Doc Nbr: 31940  
S2S Connected: no  
Initiator: testuser01  
Status: In Progress  
[more...](#)

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

### Delivery Info

- Basics
- Proposal Details
- Delivery Info**
- Sponsor & Program Information
- Organization and Location
- Key Personnel
- Compliance
- Attachments
- Questionnaire
- Budget
- Access
- Supplemental Information
- Summary/Submit

Submission By:

Submission Type:

Submission Account ID:

Submission Name & Address: [Change](#) [Clear](#)

Number of copies:

Submission description:

Back Save **Save and Continue** Close

# Adding Sponsor Information: Opportunity Info

Kuali RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

## Sponsor & Program Information

Document was successfully saved.

**Basics**

- Proposal Details
- S2S Opportunity Search
- Delivery Info
- Sponsor & Program Information**
- Organization and Location
- Key Personnel
- Compliance
- Attachments
- Questionnaire
- Budget
- Access
- Supplemental Information
- Summary/Submit

Sponsor deadline: 05/31/2017 hh:mm

Sponsor Deadline Type: select

Notice of Opportunity: select

Opportunity ID:

CFDA Number:

Subawards:  Yes, this proposal includes subaward(s)

Sponsor Proposal ID:

NSF Science Code: select

Anticipated Award Type: select

Agency Routing Identifier:

Prev Grants.Gov Tracking ID:

Opportunity Title:

Back Save Save and Continue Close

# Adding Sponsor Information: Sponsor Guidance

The screenshot displays the Kualu web application interface. At the top, a blue navigation bar contains the Kualu logo and menu items: RESEARCHER, UNIT, CENTRAL ADMIN, REPORTS, SYSTEM ADMIN PORTAL, and GET HELP. Below this, a green bar shows 'Action List', 'Doc Search', and 'User: testuser01'. The main content area is titled 'Proposal Development' and features 'Proposal: #1700441' with PI: Walter Ellis Horton. A 'Document Info' box on the right lists 'Doc Nbr: 31939', 'S2S Connected: no', 'Initiator: testuser01', and 'Status: In Progress'. A toolbar includes options for Data Validation (off), Print, Copy, Medusa, Hierarchy, Budget Versions, Link, and Help. A left sidebar menu lists 'Basics', 'Key Personnel', 'Compliance', 'Attachments' (highlighted with an orange arrow), 'Questionnaire', 'Budget', 'Access', 'Supplemental Information', and 'Summary/Submit'. The 'Attachments' section shows a notification 'Document was successfully saved.' and tabs for 'Proposal (0)', 'Personnel (0)', 'Abstracts (0)', 'Internal (0)', and 'Notes (0)'. The 'Proposal (0)' tab is active, displaying 'Add attachments to this proposal' with '+ Add' and 'Upload & Add' buttons. A 'Set All Statuses' button and a 'select' dropdown are also present. At the bottom, a footer bar contains 'Back', 'Save', 'Save and Continue', and 'Close' buttons. The URL at the bottom is https://tystate-sbx.kuali.co/res//kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=31939&comm...

# Adding Sponsor Information: Sponsor Guidance

**Kualii** RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL

Proposal Development  
Proposal: #1700441  
Walter Ellis Horton

**Attachments**  
Document was successfully saved.

**Attachments**  
Proposal (0) Personnel (0) Abstr

**Proposal (0)**  
Add attachments to this proposal  
+ Add  
Upload & Add

**Details** 1 error & 1 warning

**Attachment Type:** \*  
Sponsor Guidance

**Status:** \*  
Complete

**Contact Name:**

**Email Address:**

**Phone Number:**

**Comments:**

Description is required for Attachment Type 'Sponsor Guidance'

**Description:**  
Sponsor Guidance

**Current File:**  
Sponsor Guidance.pdf

**New File:**  
Choose File No file chosen

Don't forget to name Doc

Save

# Adding Sponsor Information: Sponsor Guidance

**Kualu** RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

Proposal Development  
**Proposal: #1700441**  
PI: *Walter Ellis Horton*

Document Info  
Doc Nbr: 31939  
S2S Connected: **no**  
Initiator: testuser01  
Status: In Progress  
[more...](#)

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Link Help

**Attachments**

⚠ The uploaded file < Sponsor Guidance.pdf > contains special characters < > in the file name. Special characters should be avoided in any file name if this proposal is being submitted via Grants.gov. X

Attachments

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

**Proposal (1)**

Add attachments to this proposal

+ Add

Upload & Add

Set All Statuses select

File	Type	Status	Description	Uploaded By	Posted Timestamp	Actions
1 Sponsor Guidance.pdf	Sponsor Guidance	Complete	Guidance	User01, Test	05/08/2017 10:08 AM	Details view/edit rights

Back Save Save and Continue Close

Warning Items in Yellow are Okay

# Adding Sponsor Information: Save & Close

The screenshot displays the Kualu system interface. A modal dialog box titled "Please Select" is centered on the screen, asking "Would you like to save this document before you close it?" with buttons for "Yes", "No", and "Return To Document". The background interface shows the "Attachments" section for a proposal. A table lists an attachment named "Sponsor Guidance.pdf" with a status of "Complete". An orange arrow points to the "Save and Continue" button at the bottom of the interface. A teal speech bubble contains the text: "Save & Continue to Move to Questionnaire or Close and 'yes' to Save if Done".

Proposal Development  
Proposal: #1700441  
PI: Walter Ellis Horton

Attachments

Attachments

Proposal (1)

Add attachments to this proposal

Upload & Add

File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1: Sponsor Guidance.pdf	Sponsor Guidance	Complete	Guidance	User01, Test	05/08/2017 10:08 AM	Details view/edit rights

Back Save **Save and Continue** Close

Save & Continue to Move to Questionnaire or Close and "yes" to Save if Done

# Other Tabs...Part III

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**Part III: Adding Final Pieces to a Kualo Proposal** will detail the remaining items for users to upload or input into Kualo

- Compliance
- Attachments

**ORSP Functional Buttons (ORSP Use Only):**

- Budget
- Access
- Supplemental Information
- Summary/Submit
- Super User Actions