

Kuali Research 6.0

PART III: ADDING FINAL PIECES TO A KUALI PROPOSAL DEVELOPMENT
RECORD

Proposal Creation: Final Proposal Pieces

The final components of a proposal record are optional for faculty to complete. These items are comprised of the following topics:

- Compliance
- Attachments

ORSP Functional Buttons (ORSP Use Only):

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

Proposal Creation: Final Proposal Pieces Compliance

The Compliance tab is used to capture ORIC activity, including the following:

- Animal Usage
- Biohazard Materials
- Human Subjects
- Export Control
- Intellectual Property
- Recombinant DNA
- Etc....

This information is by default captured in the Questionnaire and copied over by ORSP Staff. However, should a user want to complete this section, it is at their discretion to do so

Proposal Creation: Final Proposal Pieces Compliance

Proposal Development
Proposal: #1700447
PI: *Walter Ellis Horton*

Compliance 1 messages

[+ Add compliance entry](#)

- Basics
- Key Personnel
- Personnel
- Credit Allocation
- Compliance**
- Attachments
- Questionnaire
- Budget
- Access
- Supplemental Information
- Summary/Submit
- Super User Actions

Home Home : Texas State Un... NSF FastLane Home Assist Login Commons Login My Research K

SYSTEM ADMIN PORTAL

Add Compliance Entry

Type:

Approval Status:

Protocol Number:

Application Date:

Approval Date:

Expiration Date:

Exemption #:

Comments:

Proposal Creation: Final Proposal Pieces Compliance

To enter compliance items:

- Select “Add Compliance Entry”
- Select from “Type” dropdown
- Select the status of the compliance entry (Approved, Pending, Exempt, Not Yet Applied) **at the time of selection**
- If appropriate, enter remaining fields (only Type and Status are required)
- Select “Add Entry”
- Repeat process for multiple compliance items

The screenshot shows a web interface for adding a compliance entry. The page title is "Compliance". There is a button labeled "+ Add compliance entry". Below this, a dropdown menu is open, showing "Animal Usage Not yet applied". The form fields are as follows:

- Type:** * (Required) - Dropdown menu with "Animal Usage" selected and a search icon.
- Approval Status:** * (Required) - Dropdown menu with "Not yet applied" selected and a search icon.
- Protocol Number:** - Text input field.
- Application Date:** - Date picker.
- Approval Date:** - Date picker.
- Expiration Date:** - Date picker.
- Exemption #:** - Text input field with "Nothing selected" displayed below it.
- Comments:** - Text area.

Proposal Creation: Final Proposal Pieces Attachments

Proposal Attachments can be uploaded at any time during the proposal creation process. Attachments are uploaded by Category

1. Proposal

- i. Guidance
- ii. Project Narrative
- iii. Project Summary
- iv. References
- v. Facilities
- vi. Specific Aims
- vii. Etc.

2. Personnel

- i. Biosketch
- ii. Current and Pending

3. Abstracts

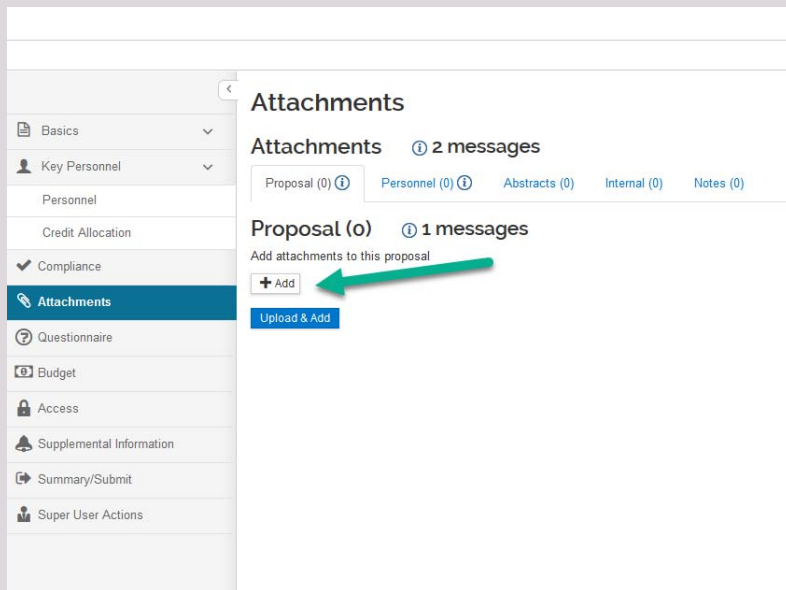
- i. S2S required abstracts
- ii. ORSP project summary

4. Internal (Emails, notes, memos)

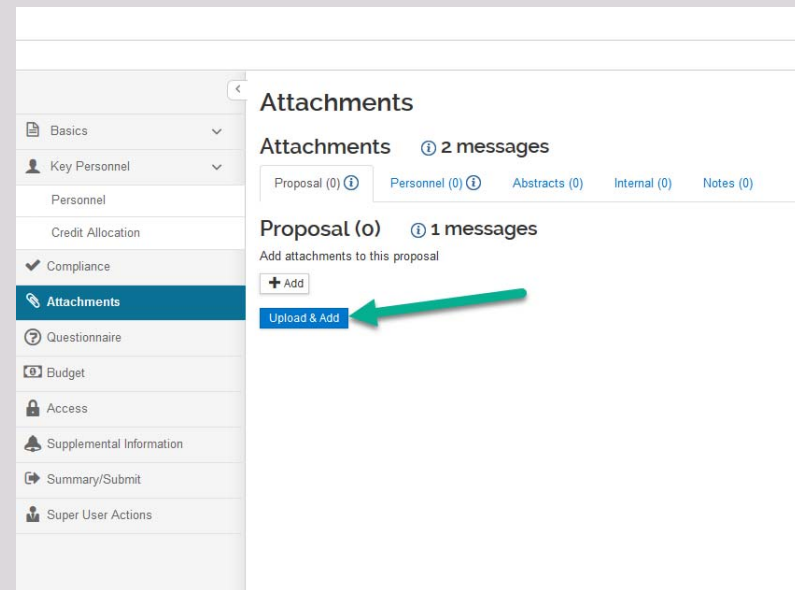
5. Notes

Proposal Creation: Final Proposal Pieces Attachments

UPLOAD OPTION A: BY ATTACHMENT TYPE



UPLOAD OPTION B: BY FILE NAME



Proposal Creation: Final Proposal Pieces Attachments

UPLOAD OPTION C: DRAG AND DROP

The screenshot shows a web application interface for proposal management. At the top right, the status is 'In Progress' with a 'more...' link. Below this is a toolbar with options: 'Data Validation (off)', 'Print', 'Copy', 'Medusa', 'Hierarchy', 'Budget Versions', 'Link', and 'Help'. A sidebar on the left contains navigation items: 'Basics', 'Key Personnel', 'Personnel', 'Credit Allocation', 'Compliance', 'Attachments' (highlighted), 'Questionnaire', 'Budget', 'Access', 'Supplemental Information', 'Summary/Submit', and 'Super User Actions'. The main content area is titled 'Attachments' and shows 'Attachments 2 messages' and 'Proposal (0) 1 messages'. Under 'Proposal (0)', there is a section 'Add attachments to this proposal' with a '+ Add' button and an 'Upload & Add' button. A PDF file icon is shown being dragged over a 'Drop Files to Add...' area. To the right of the PDF icon, there is a 'Set All Statuses' button and a 'select' dropdown menu. A '+ Copy' button is also visible near the drop area.

Proposal Creation: Final Proposal Pieces Attachments

Attachments Should be Uploaded By Category, in each distinct tab

Once uploaded, each attachment should have the following fields labeled:

1. Type (Most closely related)
2. Status (Complete or Incomplete)
3. Description (Required if "Other" Type is Selected)

Attachments

Attachments 1 messages

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

Proposal (1)

Add attachments to this proposal

[+ Add](#) Set All Statuses select

[Upload & Add](#)

File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1 BudgetJustification.pdf	BudgetJustification	Complete		Rust, Raquel Garcia	06/20/2017 02:09 PM	Details view/edit rights 🗑️

Proposal Creation: Final Proposal Pieces Save & Close

Attachments

Attachments ⓘ 1 messages

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


Proposal (1)

Add attachments to this proposal

+ Add Set All Statuses select ▼

Upload & Add

File	Type *	Status *	Description	Uploaded By	Posted Timestamp	Actions
1 BudgetJustification.pdf	BudgetJustification ▼	Complete ▼		Rust, Raquel Garcia	06/20/2017 02:09 PM	Details view/edit rights 🗑️



Back Save Save and Continue Close

Final Proposal Tabs

ORSP-PreAward Coordinator Use Only

Budget

- Detailed budgeting to be completed by PreAward until future trainings

Access

- Permission based access for PreAward to enable additional viewers

Supplemental Information

- ORSP internal information, entered by PreAward

Summary Submit

- Routing Initiation – To Be Completed by PreAward Only

Super User Actions

- PreAward Use Only Due to University AOR Roles

