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 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

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**
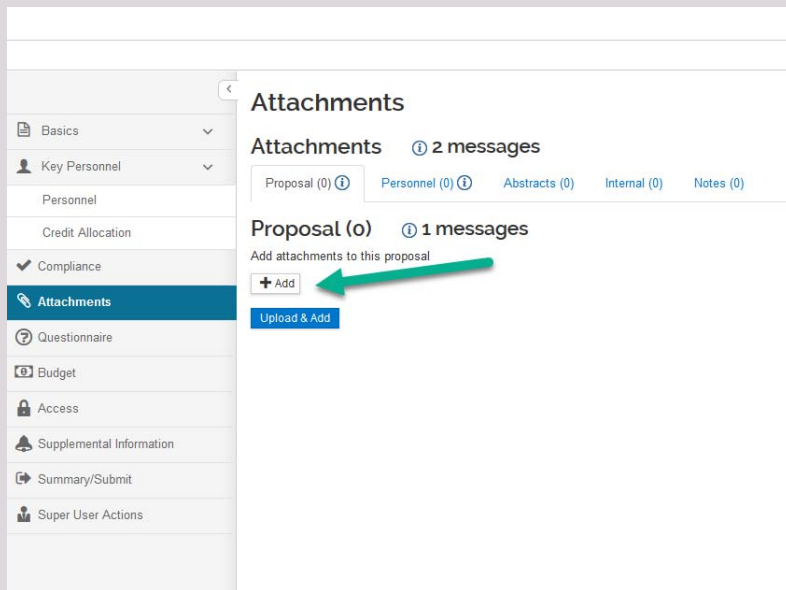   i.   Biosketch
   ii. Current and Pending

3. **Abstracts**
   i.   S2S required abstracts
   ii. ORSP project summary
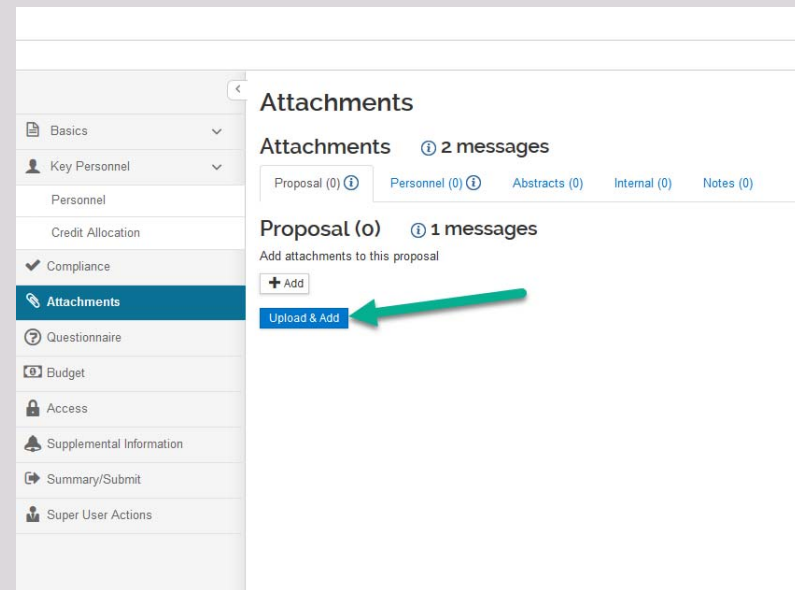4. **Internal (Emails, notes, memos)**
5. **Notes**

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

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)

Proposal Creation: Final Proposal Pieces Save & 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