

# Kuali Research 6.0

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PART I: CREATING A PROPOSAL IN KUALI RESEARCH

# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research system interface. At the top is a dark blue navigation bar with the Kuali logo on the left and menu items: RESEARCHER, UNIT, CENTRAL ADMIN, REPORTS, SYSTEM ADMIN PORTAL, and GET HELP. Below this is a light green bar containing 'Action List', 'Doc Search', and 'User: testuser01'. The main content area is white and features a large 'Welcome, Test' heading. Underneath is a 'Search Tasks' section with a text input field containing the placeholder text 'What would you like to do?'. To the right is a 'Quick Links' section with a list of links: Search for a Sponsor, View Address Book, Search for an Organization, View S2S Opportunities, and View Pessimistic Lock (Locked Records).

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

Action List Doc Search User: testuser01

## Welcome, Test

Search Tasks

Quick Links

- [Search for a Sponsor](#)
- [View Address Book](#)
- [Search for an Organization](#)
- [View S2S Opportunities](#)
- [View Pessimistic Lock \(Locked Records\)](#)

# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research system interface. The top navigation bar includes the Kuali logo and the following tabs: RESEARCHER, UNIT, CENTRAL ADMIN, REPORTS, and SYSTEM ADMIN PORTAL. The RESEARCHER tab is active, showing a sidebar menu with the following sections:

- Proposals**
  - [Create Proposal](#) (highlighted with a red arrow)
  - [Proposals Enroute](#)
  - [All My Proposals](#)
  - [Create Proposal For S2S Opportunity](#)
- Lists**
  - [Search Proposals](#)
  - [View S2S Submissions](#)
  - [Search Proposal Log](#)
  - [Search Institutional Proposals](#)
- Awards**
  - [All my Awards](#)
- Negotiations**
  - [All My Negotiations](#)

The main content area is divided into four columns:

- Proposals**
  - Actions**
    - [Create IRB Protocol](#)
    - [Amend or Renew IRB Protocol](#)
    - [Notify IRB on a Protocol](#)
    - [Request a Status Change on a IRB Protocol](#)
  - Lists**
    - [Pending Protocols](#)
    - [Protocols Pending PI Action](#)
    - [Protocols Pending Committee Action](#)
    - [Protocols Under Development](#)
    - [All My Protocols](#)
    - [Search Protocols](#)
    - [All My Reviews](#)
    - [All My Schedules](#)
- IRB Protocols**
  - Actions**
    - [Create IACUC Protocol](#)
  - Lists**
    - [All My Protocols](#)
    - [Search Protocols](#)
    - [All My Reviews](#)
    - [All My Schedules](#)
- Conflict of Interest**
  - [COI Dashboard](#)
  - IACUC Protocols**
    - Actions**
      - [Create IACUC Protocol](#)
    - Lists**
      - [All My Protocols](#)
      - [Search Protocols](#)
      - [All My Reviews](#)
      - [All My Schedules](#)
- Quicklinks**
  - [Pessimistic Lock](#)
  - [Grants.gov Opportunity Lookup](#)
  - [Reporting](#)
  - Personnel**
    - [Current & Pending Support](#)
  - Workflow**
    - [Preferences](#)

# Kuali Research: Starting a Proposal with ORSP

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

Action List Doc Search User: testuser01

## Create Proposal

\* indicates required fields

Proposal Type: \*

Lead Unit: \*

Activity Type: \*

Project Dates: \*  to

Project Title: \*


Sponsor: \*

Sponsor deadline: \*

Principal Investigator: \*

Step 1: Enter  
Basic  
Information

# Kuali Research: Starting a Proposal with ORSP

 RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

## Create Proposal

\* indicates required fields

Proposal Type: \*

Lead Unit: \*

Activity Type: \*

Project Dates: \*  to

Project Title: \*

Sponsor: \*  NIH-National Institutes of Health

Sponsor deadline: \*

Principal Investigator: \*

# Kuali Research: Starting a Proposal with ORSP

The image shows a web application interface for starting a proposal. A modal dialog box titled "KcPerson Lookup" is open, overlaying a form for proposal creation. The dialog box contains several input fields and a search button. The background form is partially visible, showing fields for Proposal Type, Lead Unit, Activity Type, Project Dates, Project Title, Sponsor, Sponsor deadline, and Principal Investigator.

**KcPerson Lookup**

KcPerson Id:	<input type="text"/>	<input type="button" value=""/>	<input type="button" value="Q"/>
Last Name:	<input type="text"/>		
First Name:	<input type="text"/>		
User Name:	<input type="text"/>		
Email Address:	<input type="text" value="user@domain.com"/>		
Office Phone:	<input type="text"/>		
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both		
Home Unit:	<input type="text"/>	<input type="button" value=""/>	<input type="button" value="Q"/>
Campus Code:	<input type="text"/>		

# Kuali Research: Starting a Proposal with ORSP

RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

## Proposal KcPerson Lookup

Show 10 entries csv xml xls

Actions	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School	Active
<a href="#">select</a>	22974	Catherine Elizabeth Horton	ceh120	CEH120@txstate.edu				512-716-2900		true
<a href="#">select</a>	23661	Walter Ellis Horton	weh21	WEH21@txstate.edu				512-245-2314		true

Showing 1 to 2 of 2 entries First Previous 1 Next Last

[← Refine Search](#) [Close](#)

# Kuali Research: Starting a Proposal with ORSP

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

Action List Doc Search User: testuser01

## Create Proposal

\* indicates required fields

**Proposal Type:** \* New

**Lead Unit:** \* 50000070 - Office of the Assoc VP for Res

**Activity Type:** \* Research

**Project Dates:** \* 05/01/2018 to 04/30/2019

**Project Title:** \* Testing Kuali Research

**Sponsor:** \* 100067 NIH-National Institutes of Health

**Sponsor deadline:** \* 05/31/2017 hh:mm

**Principal Investigator:** \* 23661  
Walter Ellis Horton

Cancel Save and Continue



# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research interface for proposal development. The top navigation bar includes 'RESEARCHER UNIT', 'CENTRAL ADMIN', 'REPORTS', 'SYSTEM ADMIN PORTAL', and 'GET HELP'. The user is logged in as 'testuser01'. The main header shows 'Proposal: #1700443' and 'PI: Walter Ellis Horton'. A 'Document Info' box on the right lists 'Doc Nbr: 31944', 'S2S Connected: [no]', 'Initiator: testuser01', and 'Status: In Progress'. Below the header is a toolbar with options like 'Data Validation (off)', 'Print', 'Copy', 'Medusa', 'Hierarchy', 'Budget Versions', 'Link', and 'Help'. The left sidebar, titled 'Basics', contains a list of menu items: 'Proposal Details', 'S2S Opportunity Search', 'Delivery Info', 'Sponsor & Program Information', 'Organization and Location', 'Key Personnel', 'Compliance', 'Attachments', 'Questionnaire', 'Budget', 'Access', 'Supplemental Information', and 'Summary/Submit'. A red arrow points to the 'Basics' menu item. The main content area, 'Proposal Details', contains the following fields: 'Proposal Type' (New), 'Lead Unit' (50000070 - Office of the Assoc VP for Res), 'Activity Type' (Research), 'Project Dates' (05/01/2018 to 04/30/2019), 'Project Title' (Testing Kuali Research), 'Sponsor' (100067 NIH-National Institutes of Health), 'Prime Sponsor Code', and 'Keywords' (Nothing selected). At the bottom, there are 'Save', 'Save and Continue', and 'Close' buttons.

# Kuali Research: Starting a Proposal with ORSP

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

Action List Doc Search User: testuser01

Proposal Development  
**Proposal: #1700443**  
PI: *Walter Ellis Horton*

Document Info  
Doc Nbr: 31944  
S2S Connected: no  
Initiator: testuser01  
Status: In Progress  
[more...](#)

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

Document was successfully saved.

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

**Key Personnel**  
Search for and add key personnel  
[Add Personnel](#) [Notify All](#)

Walter Ellis Horton (PI/Contact) (Certification Incomplete) [Notify Walter Ellis Horton](#)

Annual Disclosure Status: Not Yet Disclosed

Back Save [Save and Continue](#) Close

<https://bstate-sb.kuali.co/res/kc-pd-krad/proposalDevelopment?formKey=d01d6923-8cd9-49c4-8be3-beac1cb01d6...>

# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research interface. At the top, a navigation bar includes 'RESEARCHER', 'UNIT', 'CENTRAL ADMIN', 'REPORTS', and 'SYSTEM ADMIN PORTAL'. The main content area shows a 'Key Personnel' section for user #1700443, Horton. A modal dialog box titled 'Add Personnel' is open, featuring a search filter for 'Employee' (selected) or 'Non Employee'. The form fields include: Last Name, First Name, User Name, Email Address (pre-filled with 'user@domain.com'), Office Phone, Home Unit (with a search icon), and Campus Code (with a search icon). At the bottom of the dialog are 'Continue...' and 'Cancel' buttons. The background interface shows a notification 'Document was successfully s...', a search bar, and a list item for 'Walter Ellis Horton (PI/Contact)' with an 'Annual Disclosure Status: Not Yet'.

# Kuali Research: Starting a Proposal with ORSP

Credit Allocation		Refresh View
	F&A Distribution	
Walter Ellis Horton	50	
50000061 - Office of the Provost and VPAA	50	
<b>Unit Total:</b>	<b>50</b>	
Michael T Blanda	50	
50000070 - Office of the Assoc VP for Res	50	
<b>Unit Total:</b>	<b>50</b>	
<b>Investigator Total:</b>	<b>100</b>	

Step 2.1 Credit Allocation:  
How should PI portion of  
F&A distribution be split  
between PI and Co-PI(s)?\*

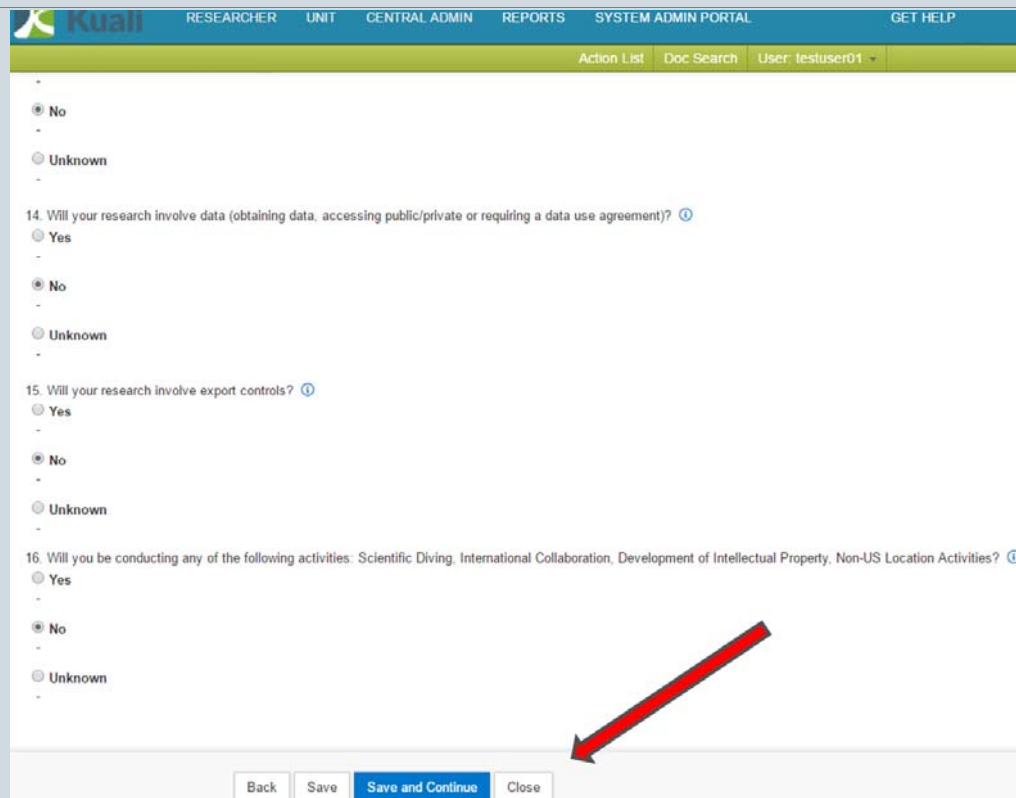
[\\*http://policies.txstate.edu/university-policies/03-04-05.html](http://policies.txstate.edu/university-policies/03-04-05.html)

# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research interface. The top navigation bar includes 'RESEARCHER', 'UNIT', 'CENTRAL ADMIN', 'REPORTS', 'SYSTEM ADMIN PORTAL', and 'GET HELP'. The user is logged in as 'testuser01'. The left sidebar contains a menu with items: Basics, Key Personnel, Personnel, Credit Allocation, Compliance, Attachments, **Questionnaire** (highlighted with a red arrow), Budget, Access, Supplemental Information, and Summary/Submit. The main content area is titled 'Questionnaire' and shows a 'Proposal - OSP Questionnaire (Incomplete)' form. The form includes a 'Clear' and 'Print' button, and a list of seven questions with radio button options for 'Yes' and 'No'. A yellow callout box points to the first question with the text 'Enter Link to Guidance Here'. At the bottom of the form are 'Back', 'Save', 'Save and Continue', and 'Close' buttons.

**Step 3: Answer Questionnaire & Close Proposal**

# Kuali Research: Starting a Proposal with ORSP



Kuali RESEARCHER UNIT CENTRAL ADMIN REPORTS SYSTEM ADMIN PORTAL GET HELP

Action List Doc Search User: testuser01

No  
-  
 Unknown  
-

14. Will your research involve data (obtaining data, accessing public/private or requiring a data use agreement)? ⓘ  
 Yes  
-  
 No  
-  
 Unknown  
-

15. Will your research involve export controls? ⓘ  
 Yes  
-  
 No  
-  
 Unknown  
-

16. Will you be conducting any of the following activities: Scientific Diving, International Collaboration, Development of Intellectual Property, Non-US Location Activities? ⓘ  
 Yes  
-  
 No  
-  
 Unknown  
-

Back Save **Save and Continue** Close

# Kuali Research: Starting a Proposal with ORSP

The screenshot displays the Kuali Research interface. At the top, the navigation bar includes 'RESEARCHER', 'UNIT', 'CENTRAL ADMIN', 'REPORTS', and 'SYSTEM ADMIN PORTAL'. A 'Please Select' dialog box is overlaid on the page, asking 'Would you like to save this document before you close it?' with three buttons: 'Yes', 'No', and 'Return To Document'. A red arrow points from the 'Yes' button in the dialog to the 'Save and Continue' button at the bottom of the page. The background shows a 'Questionnaire' form for 'Proposal - OSP Questionnaire (Incomplete)'. The form includes a sidebar with navigation options like 'Basics', 'Key Personnel', 'Personnel', 'Credit Allocation', 'Compliance', 'Attachments', 'Questionnaire', 'Budget', 'Access', 'Supplemental Information', and 'Summary/Submit'. The main content area contains three numbered questions with radio button options for 'Yes' and 'No'. At the bottom of the page, there are buttons for 'Back', 'Save', 'Save and Continue', and 'Close'.

**Please Select**

Would you like to save this document before you close it?

**Questionnaire**

Proposal - OSP Questionnaire

**Proposal - OSP Questionnaire (Incomplete)**

1. Please type or copy/paste the Sponsor Guidance (guidelines) or RFP for this proposal. An uploaded copy of the guidance can be included in the 'Attachments' tab. If there is no guidance for this proposal, please enter "N/A".

2. Have you informed your chair, dean, and/or director of this proposal?

Yes

No

3. I understand that per UPPS 02.02.01, a completed proposal is due to the Office of Sponsored Program by 9am, 3 working days prior to the sponsor deadline.

Yes

No

# Kuali Research: Starting a Proposal with ORSP

**Submit**

Document was successfully saved.

Progress: Saved | Routing | Approved

Proposal Summary | Personnel | Credit Allocation | Compliance | Attachments | Questionnaire | Supplemental Info | Keywords

### Proposal Summary

Title	Testing Kuali Research
Principal Investigator	Walter Ellis Horton
Lead Unit	50000070 - Office of the Assoc VP for Res
Activity Type	Research
Proposal Number	1700420
Project Start Date	01/01/2018
Project End Date	12/31/2019
Include Subaward(s)?	No
Sponsor Name	NIH-National Institutes of Health
Sponsor Deadline Date	05/05/2017
Sponsor Deadline Type	Receipt

~~Submit for Review~~ | Ad Hoc Recipients | View Route Log | Cancel proposal | Delete Proposal | More Actions | Close

Summary/Submit Tab to review your initial proposal information

**Do Not** Click on “**Submit For Review**” (PreAward/ORSP Action Only for Routing Purposes)



# Kuali Research: Other Tabs...Parts II & III

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## **Part II: Additional Sponsor Information**

- Delivery
- Opportunity ID
- Opportunity Title
- Guidance Documents

## **Part III: Adding Final Pieces to a Proposal**

- Compliance
- Attachments

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

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