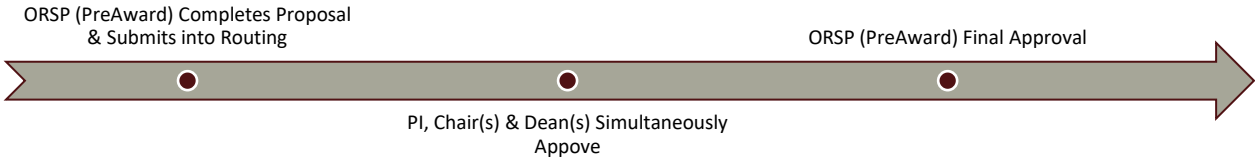


Approving Kualo Routing for Proposal Development

Kualo Proposal Routing is completed via a 2 step process, prior to submission to a sponsor:

1. PI, Chair and Dean Approval
2. ORSP Approval



Options to approve a Proposal in Kualo Routing:

- 1) Email Prompt
- 2) Dashboard Access

Email Routing Approval

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”

Action List Reminder Inbox x

grants@txstate.edu 11:41 AM (2 hours ago) ☆

to me

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 31940
Initiator: User01, Test
Type: Add/Modify ProposalDevelopmentDocument
Title: Testing Kualo Resea; Proposal No: 1700442; PI: Walter Ellis Horton; Sponsor: American Chemical Society; Due Date: 05/31/2017

To respond to this eDoc:
Go to <https://txstate-sbx.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=31940&command=displayActionListView>

Or you may access the eDoc from your Action List:
Go to <https://txstate-sbx.kuali.co/res/kew/ActionList.do>, and then click on the numeric Document ID: 31940 in the first column of the List.

To view the route log of this document:
Go to <https://txstate-sbx.kuali.co/res/kew/RouteLog.do?documentId=31940>

To change how these email notifications are sent(daily, weekly or none):
Go to <https://txstate-sbx.kuali.co/res/kew/Preferences.do>

For additional help, email <mailto:grants@txstate.edu>

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

Submit

Progress: Saved | Routing | Approved

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

Proposal Summary

Title	...
Principal Investigator	...
Lead Unit	50000119 - Physics
Activity Type	Research
Proposal Number	1700171
Project Start Date	07/01/2017
Project End Date	06/30/2018
Include Subaward(s)?	No
Sponsor Name	...
Sponsor Deadline Date	12/06/2016
Sponsor Deadline Type	Receipt

Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities/space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.

Buttons: Send Adhoc, Ad Hoc Recipients, Approve, Return, View Route Log, Submit to Sponsor, More Actions, Close

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.

Submit

Progress: Saved | Routing | Approved

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

Proposal Summary

Title	Testing Kual Research
Principal Investigator	Walter Ellis Horton
Lead Unit	50000070 - 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	

Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities/space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal.

Buttons: Send Adhoc, Ad Hoc Recipients, Approve, Return, View Route Log, More Actions, Close

Dashboard Routing Approval

STEP 1: Login to Kualii Research

TEXAS STATE

Login to Kualii SaaS

NetID > Forgot your password?
> Activate your NetID

Password

Login

Kualii SaaS

Kualii Software as a Service

Use of computer and network facilities owned or operated by Texas State University requires prior authorization. Unauthorized access is prohibited. Usage may be subject to security testing and monitoring, and affords no privacy guarantees or expectations except as otherwise provided by applicable privacy laws. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University.

STEP 2: Navigate and Access Approval

Navigate to the left card on the dashboard; all proposals requiring approval will display on this card. intended proposal for review and approval, by clicking on the proposal.

Dashboard Show/Hide cards

Proposals routing to me Sort by

You're up! Proposal #2206 - Pt: [redacted] - Sponsor: Eastern New Mexico University - Title: Enhancing STEM skills thr... - ...
Due date: 10/28/20 Last action: [redacted] 9/03/20 10:07 AM

1-1 < >

Proposals not routing Sort by

Proposal Proposal #2207 - Pt: [redacted] - Sponsor: Tarleton University - Title: SWEET-Standardizing Weld... - Lead unit: ...
Due date: 10/28/20 Last action: [redacted] 5/27/20 2:29 PM

Proposal Proposal #2208 - Pt: [redacted] - Sponsor: U.S. Dept of Agriculture - Title: Utilizing virtual reality... - Lead unit: 5...
Due date: 10/28/20 Last action: [redacted] 5/27/20 2:47 PM

Proposal Proposal #2211 - Pt: [redacted] - Sponsor: U.S. Dept of Agriculture - Title: Establishing an Agricultu... - Lead uni...
Due date: 7/16/20 Last action: [redacted] 5/27/20 3:58 PM

1-3 < >

Proposal workload assignments

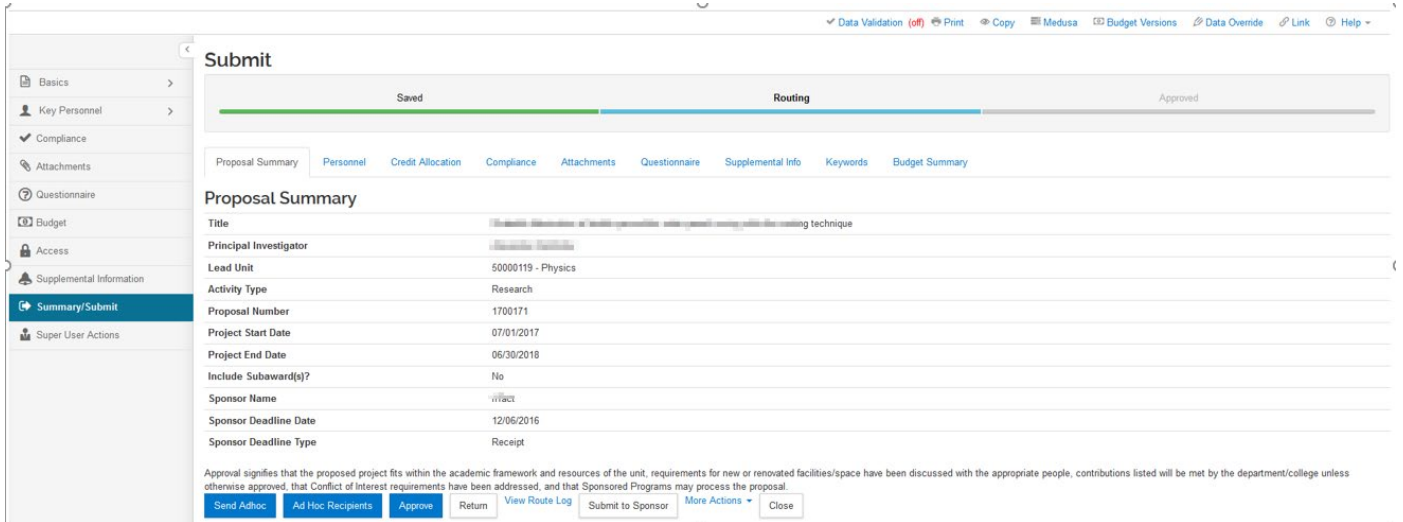
Proposal Number	Principal Investigator	Sponsor	Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#2206	[redacted]	Eastern New Mexico University	50000083	Enhancing STEM skills through Metal Fabrication	10/28/2020	09/03/2020 10:07 AM	[redacted]	

Rows per page 10 1-1 < >

STEP 3: PI/CHAIR/DEAN REVIEW

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STEP 4: APPROVE OR RETURN

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