

Instructions for initiating a proposal in Kuali Research



Follow Steps 1-5. Images and other instructions are referenced in the steps below and can be found on pages 2-6

Step 1: The link for Kuali Research *Proposal Development* is <https://txstate.kuali.co/dashboard/>

Step 2: Use your university NetID and Password to login and complete the 2 Step Authentication. The screen that appears once the authentication is completed is the **Kuali Dashboard** (see **Image 1** on the following page).

Step 3: On the **Kuali Dashboard**, click on the **Common Tasks** icon –  – on the left side of the screen.
Next, find and click on ‘**Create Proposal.**’ (see **Image 2** on page 3).

Step 4: On the **Create Proposal** screen (see **Image 3** on page 4), enter your project information.
The information entered into the fields on this page is used to create your **Kuali Research *Proposal Development* Record**, aka your Kuali Record.

See page 6 to review the descriptions of each field on the ‘Create Proposal’ screen.

Please note the special instructions for the ‘Principal Investigator’ field.

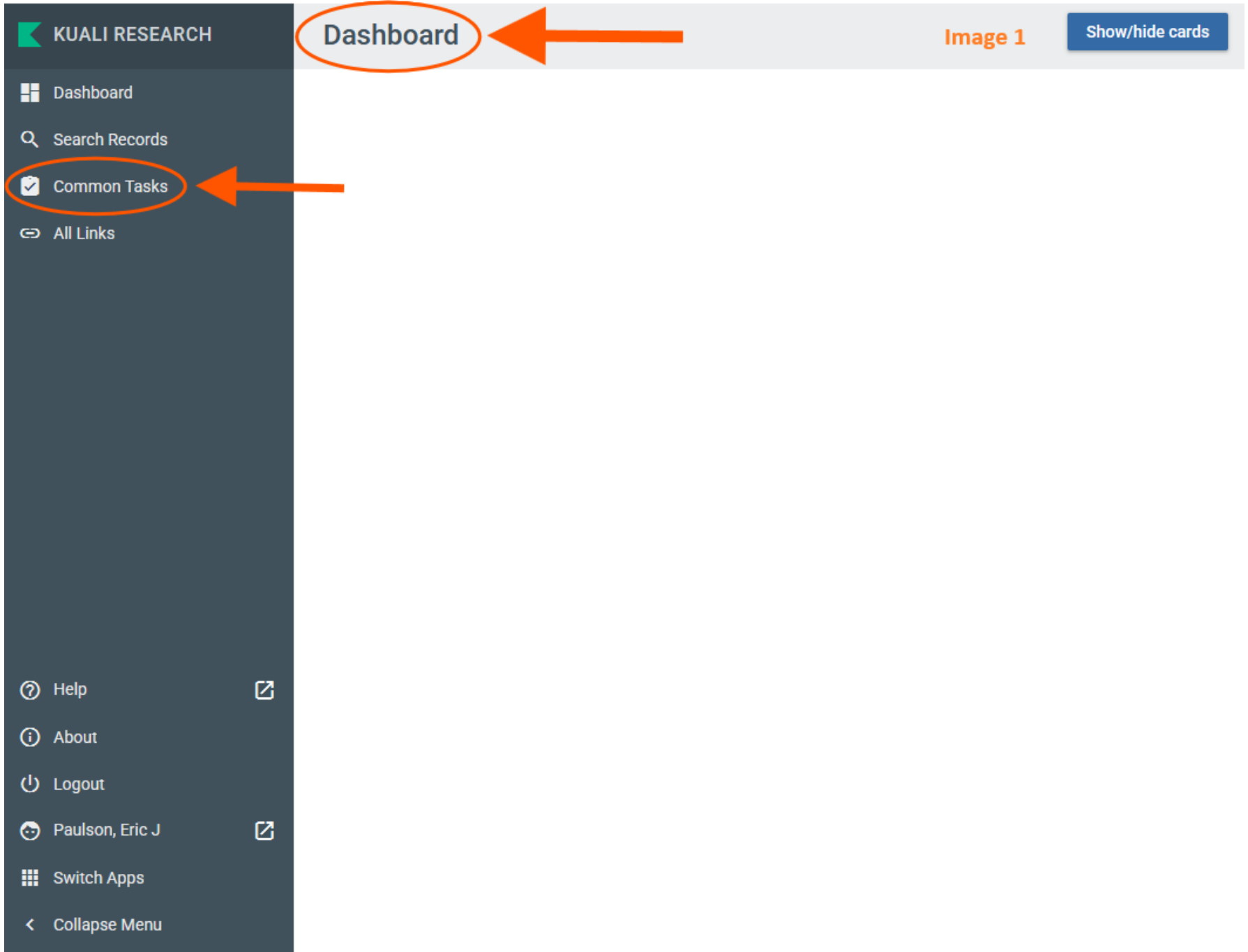
After entering proposal information, click on the blue box labeled **Save and Continue**. This will initiate your Kuali Research *Proposal Development* record and **send a notification to all PreAward staff in OSP.**

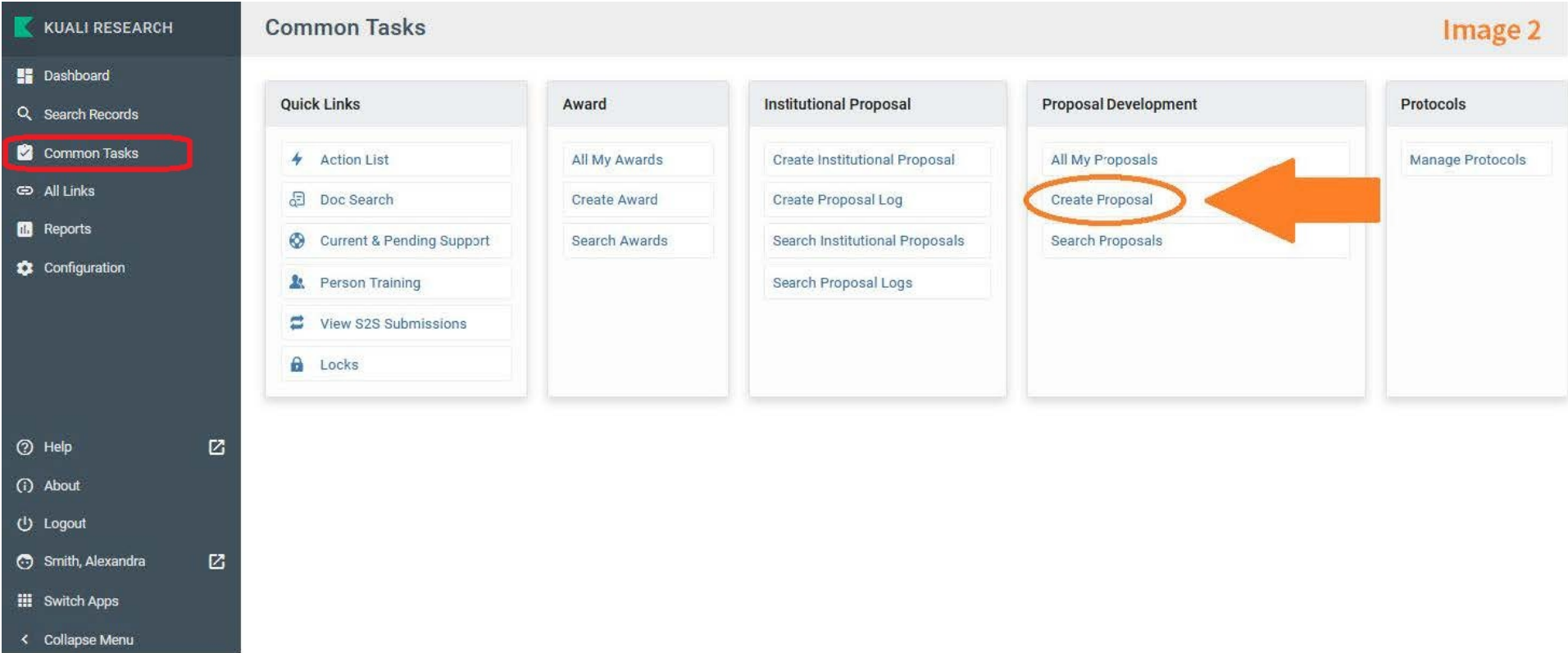
Step 5: Sections the PI must Complete in Kuali before routing, but not immediately. Can be skipped.

1. **Questionnaire.** Include link to RFP or similar document for Question #1 if available. When you have completed the questions, confirm that the Questionnaire says ‘Complete’ in green text above Question #1. Please note that other Questionnaires may open up, such as when you mark you are paying graduate students.
2. Although other sections may get filled out, such as Personnel, but this is best done when near routing and in consultation with your RC.

After STEP 4 and, if you choose, STEP 5, EXIT Kuali by clicking on **Close** at the bottom of the screen (and saving when prompted).

DO NOT USE THE SUBMIT TAB OR ANY BUTTONS ON THIS TAB. These buttons are not for faculty use in most circumstances.





Kuali ResearchImage 3

Create Proposal

* indicates required fields

Proposal Type: *

Options include: New, Continuation, LOI, PreProposal, Supplement, Task Order

Lead Unit: *

Select your Department

Note: This is the only item that CANNOT be revised after proposal is created.

Activity Type: *

Research OR Instruction

Project Dates: *

Enter anticipated Project Start Date

to

Enter anticipated Project End Date

Project Title: *

Enter title of project

Sponsor: *

Enter the *Sponsor Name* into this field or **TBD**, if the sponsor does not auto-populate as you type.

Q

Sponsor deadline: *

Enter the sponsor's proposal deadline (or the document deadline for lead institution if TXST is a subaward).

Principal Investigator: *

Enter your Personnel ID or follow steps in **Image 4** on the following page.

Q

Cancel

Save and Continue

Lookup Image 4

KcPerson Lookup

KcPerson Id:

Last Name:

First Name:

User Name:

Email Address:

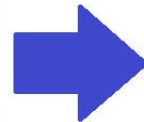
Office Phone:

Active: ☒ Yes ☐ No ☐ Both

Home Unit:

Campus Code:

Close Clear Values **Search**



Lookup

KcPerson Lookup

One item retrieved.

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
select	A00338016	Alexandra Smith	as55	AS55@txstate.edu		Sr Proposal Coordinator		512-245-4625		true

Showing 1 to 1 of 1 entries

First Previous **1** Next Last



Kuali Research

Create Proposal

* indicates required fields

Proposal Type:

Lead Unit:

Activity Type:

Project Dates: to

Project Title:

Sponsor: To Be Determined

Sponsor deadline:

Principal Investigator: Alexandra Smith

Cancel **Save and Continue**



Proposal Type: In most cases, 'New' is the appropriate selection. If the proposal is a Letter of Intent or PreProposal, select 'Letter of Intent' or 'PreProposal'. If the proposal is a resubmission to a sponsor which you have submitted this same proposal to previously, select 'Resubmission.'

Lead Unit: Usually your department is the lead unit. *Note:* This is the only information that you cannot revise after the proposal has been initiated. Please be as specific as possible to your Department, not your College, unless you are a Dean or report directly to a Dean.

Activity type: Select 'research' if data will be collected for research purposes. Select 'instruction' if no data will be collected and funds will be spent on training or education only.

Project Dates: Enter the projected start date and end date for your project. Dates can be revised later, if needed.

Project Title: Enter your proposed title. Project Title can be revised later.

Sponsor: Enter the sponsor's name. As you type, your sponsor's name may appear below the text box. If it does, click on the name. If the sponsor does not have an existing profile in Kuali, their name will not appear. In this case, type '888888' or 'TBD' for this initial page. If it is TBD, please enter the name of the sponsor somewhere, such as under sponsor information or as part of your tentative project title. This will inform your RC / OSP and they will be able to create a new code, going forward, to reference your particular sponsor.

Sponsor deadline: Enter the deadline provided by the sponsor or, if not specified, enter a target submission date.

Principal Investigator: This field operates on the Personnel ID (begins with an 'A') assigned to faculty and staff by TXST Human Resources. If you know your 'A number,' enter in the 'Principal Investigator' field and click 'Save and Continue;' otherwise, search for yourself in the system using your name.