



Approving a Proposal in Kuali Research

Contents

Approve or Reject.....	1
Viewing the Budget	4
Viewing Other Proposal Details	7

Approve or Return

Approvers will see documents requiring their attention in their Action List (button in top righthand corner). Also, the user should receive an email notification depending on your institutional configurations. Once in a document the approver may click through the tabs in the Submit screen to view the summarized information in the proposal without having to leave this screen, however, they also can navigate to each tab of the proposal if they choose. The following are the approver options when a document is routed:

- **Approve:** This signifies your approval of the proposal and allows it to continue along the workflow path. You may receive a message asking if you wish to receive future approval requests if you also appear in a future workflow stop - clicking yes will require you to approve again at the future stop, whereas, clicking no will automatically approve on your behalf at the future stop.
- **Return:** If the proposal requires substantial corrections use the return action to return to the aggregator for necessary changes. Upon return you must then enter a reason for the action in the confirmation window that appears. Once returned, all of the proposal details, narratives, and budget can be fully edited by the aggregator and then resubmitted into the approval routing workflow for submission. FYI - some edits can be performed while the proposal is enroute (aka in workflow routing) such as:
 - Replacing existing narrative attachments (new attachment types cannot be added.)
 - Data Override actions (as determined in your local implementation).
- **Disapprove:** If you do not want this proposal to continue the disapprove action will make the proposal no longer a valid submission document; it will not be returned to the aggregator for corrections, nor will it continue in workflow. To return a proposal to the aggregator, use the Return button. Once Disapproved is clicked, a confirmation window will appear; enter the reason for the disapproval and then click "OK" to complete the action. Otherwise click 'cancel.'

Approving a proposal in Kuali is a simple and intuitive process. If you have any questions, then please email us at srs.era@uc.edu. We're happy to help!

First, you will receive an email asking you to please approve the proposal:

From: SRS.ERA=uc.edu@mx3.kuali.co <SRS.ERA=uc.edu@mx3.kuali.co> On Behalf Of SRS.ERA@uc.edu
<SRS.ERA@uc.edu>
Sent: Monday, April 12, 2021 8:19:59 PM (UTC-05:00) Eastern Time (US & Canada)
To: Sponsored Research Services (ospwest) <ospwest@ucmail.uc.edu>
Subject: Kuali Research Action - Proposal - APPROVE - PI: Janet Boyle - Due Date: null - Lead Unit: 60000027 - Sponsor: National Kidney Foundation, Inc. - Title: KMTTest0412-Lead A&S

Please complete the APPROVE action for Janet Boyle in Proposal for "KMTTest0412-Lead A&S"
Your timely action is requested.
Failure to act when an approval is requested will stop routing.

To review the requested action: [Document #613169](https://ucincinnati.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=613169&command=displayActionListView)
<https://ucincinnati.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=613169&command=displayActionListView>

Or, to see all actions requested: [Action List](#)
<https://ucincinnati.kuali.co/res/kew/ActionList.do>, and then click on the numeric Document ID: 613169 in the first column of the List.

Action Item sent to boylejn

Select the link to the proposal by clicking the document #. This will direct you to your Kuali Log-in/Central UC login screen.

Sign in to:
<https://saas1.kuali.co/auth>

University of
CINCINNATI

lampsoam

.....

Log In

Need Help?
[Get My Username](#)
[Change My Password](#)
[Forgot My Password](#)
Call the [IT@UC Service Desk](#) at [513-556-HELP\(4357\)](tel:513-556-HELP(4357)) option 2 or [866-397-3382](tel:866-397-3382) option 2.

By using this service you agree to adhere to
[UC Information Security Policies](#)

Enter your UC Central Log-in (6 + 2) and password.

Once you are signed in to Coeus, you will be at the proposal where you can go directly to **Approve** or **Reject** it. You can also view the proposal by selecting the appropriate link on the left navigation.

To approve the proposal, simply select **Approve**:

After you approve you may click on view routing at the bottom of the screen to confirm your approval:

Route Status	ENROUTE	Last Approved
Document Status		Document Status Modified
Node(s)	PeopleFlows, JoinCostShare	Finalized

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Lampson, Amanda M		01:11 PM 03/29/2021	
COMPLETED	Adams, Kellee E.		01:20 PM 03/29/2021	
APPROVED	Limbach, Patrick A		02:19 PM 03/29/2021	

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	AS Chemistry Dept Approver	01:20 PM 03/29/2021	PeopleFlow Name: AS Chemistry Dept Approver
PENDING APPROVE	Arts and Sciences College Approver - AOR	01:20 PM 03/29/2021	PeopleFlow Name: Arts and Sciences College Approver - AOR

You can also see the full chain which shows who still needs to approve before the proposal can be sent to the sponsor.

If you need to return the proposal, then select **Return** from the first screen. You will need to enter a brief comment in order to return.

If you return the proposal, then you are sent to the main proposal screen. At this point you can log out of Kuali. The aggregator on the proposal received a message from the system stating that you returned the proposal. Once changes are made, then you will receive another email asking you to approve.

Viewing the Budget

The basics of the budget are on the Budget Summary tab you see after you log-in to Kuali to approve the proposal.

Budget Summary

Cost Sharing Amount: 0.00 Underrecovery Amount: 0.00
Program Income: 0.00 F&A Rate Type: MTDC

	P1(09/01/2021 - 08/31/2022)	Totals
Personnel		
▶ Salary	\$38,500.00	\$38,500.00
▶ Fringe	\$11,819.50	\$11,819.50
Calculated Direct Costs	\$0.00	\$0.00
Personnel Subtotal	\$50,319.50	\$50,319.50
Non-personnel		
▶ Other Direct	\$50,000.00	\$50,000.00
Calculated Direct Costs	\$0.00	\$0.00
Non-personnel Subtotal	\$50,000.00	\$50,000.00
Totals		
Total Direct Cost	\$100,319.50	\$100,319.50
Total F&A Costs	\$62,198.09	\$62,198.09
Totals Subtotal	\$162,517.59	\$162,517.59

▶ F&A Rates

Send Adhoc Ad Hoc Recipients View Route Log Recall Submit to Sponsor More Actions Close

To see budget details, select Budget from the left navigation tab. Then from the new screen select the name of the budget version that has (for submission) under it, then open budget document.

1.

2.

Name	Version	Direct Cost	F&A
V1 (for submission)	1	100,319.50	62,198.09

3.

Select what you would like to see from the navigation menu on the left:

Kuali Research

Proposal #15618 > Budget #1

Budget #1: V1

Marked For Submission: Yes

Created: 03/29/2021

Proposal: #15618

[more...](#)

Data Validation (on) Budget Settings Summary Budget Versions Autocalculate Periods Data Override Help

59364

[Return to proposal](#)

- Periods & Totals
- Rates
- Personnel Costs
- Non-Personnel Costs
- Subawards
- Institutional Commitments
- Project Income
- Modular
- Budget Notes
- Budget Summary

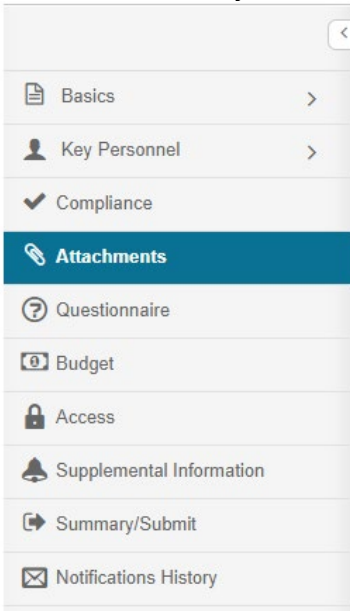
Periods & Totals

Recalculate with changes Reset to period defaults

Period Start Date *	Period End Date	Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit
09/01/2021	08/31/2022	12.0	162,517.59	100,319.50	62,198.09	0.00	0.00	0.00	0.00
		Total: 12.00	Total: 162,517.59	Total: 100,319.50	Total: 62,198.09	Total: 0.00	Total: 0.00	Total: 0.00	

Attachments

From the Summary Submit screen, select **Attachments**



Once on the Attachment screen, you will see four types of attachments and an abstracts tab: Proposal attachments, Personnel abstract and Internal attachments. *Biosketches and Other Support will be in the personnel tab.

Kuali Research

Proposal Development

Proposal: #15618

PI: *Patrick A Limbach*

Document Info
Doc Nbr: 604125
S2S Connected: no
Initiator: lampsoam
Status: Approval Pending
[more...](#)

[Data Validation \(off\)](#) [Print](#) [Medusa](#) [Budget Versions](#) [Link](#) [Help](#)

Attachments

Attachments

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

Proposal (1)

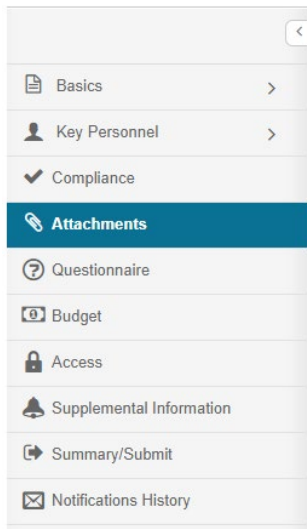
Add attachments to this proposal

[Download All](#)

File	Type *	Status	Description	Uploaded By	Posted Timestamp
1 ResearchPlanLimbachNSF.pdf	Narrative	Complete		Lampson, Amanda M	03/29/2021 12:16 PM

Viewing Other Proposal Details

From any Proposal screen, select the section you would like to view from the menu on the left..



Note: The UC Policy Questionnaire is required for all proposals. Other questionnaires may be answered depending on sponsor requirements.

Full Routing Map View sample:

Future Action Requests		hide	
Action	Requested Of	Time/Date	Annotation
show PENDING APPROVE	Limbach, Patrick A	12:06 PM 03/29/2021	Role: KC-PD PI from PeopleFlow Name: Proposal Development Standard Workflow
show PENDING APPROVE	AS Chemistry Dept Approver	12:06 PM 03/29/2021	PeopleFlow Name: AS Chemistry Dept Approver
show PENDING APPROVE	Arts and Sciences College Approver - Natural Sciences	12:06 PM 03/29/2021	PeopleFlow Name: Arts and Sciences College Approver - Natural Sciences
show PENDING APPROVE	Arts and Sciences College Approver - AOR	12:06 PM 03/29/2021	PeopleFlow Name: Arts and Sciences College Approver - AOR
