Approving a Proposal in Kuali Research

Contents

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 OfSRS.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: KMTest0412-Lead A&S

Please complete the APPROVE action for Janet Boyle in Proposal for "KMTest0412-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

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.

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 confirms your approval:

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.

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.

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 ⑦ Help ▾

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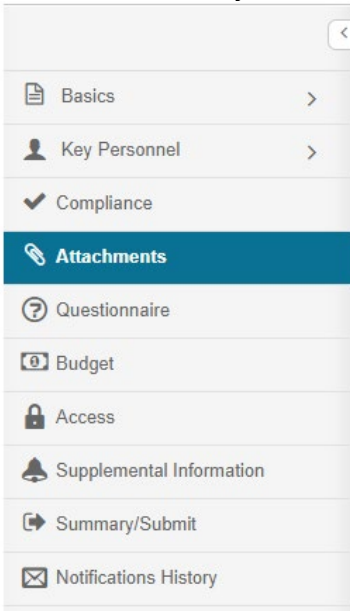
Once on the Attachment screen, you will see four types of attachments and an absracts tab: Proposal attachments, Personnel abstract and Internal attachments.   *Biosketches and Other Support will be in the personnel tab.

Viewing Other Proposal Details

From any Proposal screen, select the section you would like to view from the menu on the left..
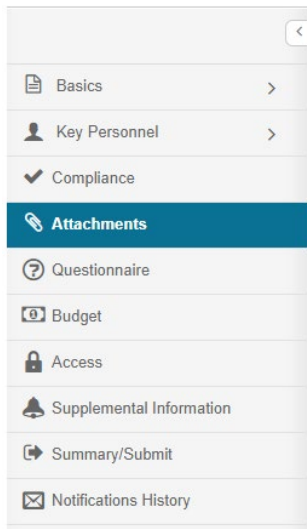
Note: The UC Policy Questionnaire is required for all proposals. Other questionnaires may be answered depending on sponsor requirements.

Full Routing Map View sample: