# Kuali Research

## Non-S2S Proposal Development with Summary Budget
## Training Exercises

University of California San Diego
Train-the-Trainer

## Exercise 1 – Logging In

| Step No. | Instructions |
|---|---|
| 1 | Navigate to: *<insert training site link>* |
| 2 | **Username**: *<enter your username>*<br>**Password**: *<enter your password>* |

## Exercise 2 – Searching for Proposals

| Step No. | Instructions |
|---|---|
| 1 | From the left-hand navigation:<br>- Click on **Common Tasks**<br>- In Common Tasks, elected **Search Proposals** |
| 2 | In the **Development Proposal Lookup** window select/enter:<br>− **Proposal Type**: **New**<br>− **Proposal State**: **In Progress**<br>− **Project Title**: ***KR Training***<br>− Click the **search** button |
| 3 | In the displayed search results:<br>− Click the **view** link to open one of the proposals |

## Exercise 3 - Initiating a Proposal

| Step No. | Instructions |
|---|---|
| 1 | From the left-hand navigation:<br>- Click on **Common Tasks**<br>- In Common Tasks, elected **Create Proposal** |

| | |
|---|---|
| 2 | In the **Create Proposal** window select/enter:<br>– **Proposal Type**: **New**<br>– **Lead Unit**: **000304 - Neurosciences**<br>– **Activity Type**: **Clinical Research**<br>– **Project Dates**: **01/01/2020** (start date) and **12/31/2024** (end date)<br>– **Project Title**: **My Important Project – <enter your initials>**<br>– **Sponsor**: **BILL & MELINDA GATES MEDICAL RESEARCH INSTITUTE** *(**Quick Tip**: you can start typing the sponsor name in the sponsor field and the available options for selection will display)*<br>– **Sponsor deadline**: **09/30/2019**<br>– **Sponsor Deadline Type**: **Hard Deadline**<br>– **Anticipated Agreement Type**: **Contract**<br>– Click the **Save and Continue** button |
| 3 | The **Proposal** will open with the display defaulted to the **Proposal Details** screen. |

## Exercise 4 – Assigning Proposal Roles

| Step No. | Instructions |
|---|---|
| 1 | While in the Proposal, click the **Access** panel |
| 2 | In the **Permission** screen:<br>– Click the **Add User** button<br>– In the **Add Permission** window, search for and return **admin**<br>– **Assign a role**: **Aggregator Document Level**<br>– Click the **Add Permission** button |
| 3 | Click the **Save** button at the bottom of the **Permissions** screen. |

## Exercise 5 – Completing Delivery Info

| Step No. | Instructions |
|---|---|
| 1 | In the **Delivery Info** screen:<br>− **Submission By**: **OSP**<br>− **Submission Type**: **Electronic**<br>− **Submission description: Please email to kat@kuali.co**<br>− Click the **Save and Continue** button |

## Exercise 6 – Completing Sponsor & Program Information

| Step No. | Instructions |
|---|---|
| 1 | In the **Sponsor & Program Information** screen select/enter:<br>− **Notice of Opportunity**: **Non-Federal Solicitation**<br>− **Subawards: checked**<br>− **Science Code**: <*select an appropriate option*><br>− Click the **Save and Continue** button |

## Exercise 7 – Adding Key Personnel, Updating Details

| Step No. | Instructions |
|---|---|
| 1 | While in the Proposal, select **Key Personnel** → **Personnel** subpanel |
| 2 | In the **Key Personnel** screen:<br>− Click the **Add Personnel** button<br>o In the **Add Personnel** window:<br>▪ Select **Employee** radio button<br>▪ **Last Name**: **Neuroinvestigagor**<br>▪ Click the **Continue** button<br>o In the **Search Results** window:<br>▪ Select the radio button for **David Test Neuroinvestigator**<br>▪ Click the **Continue** button |

- In the **Assign a role** window:
  - Select the radio button for **Principal Investigator**
  - Click the **Add Person** button

- Click the ► next to the name of the **Principal Investigator**
- Click the tabs to view information
- Click the **Unit Details** tab and review the Units associated with the PI
- Click the **Save** button

3 In the **Key Personnel** screen:

- Click the **Add Personnel** button
  - In the **Add Personnel** window:
    - Select **Non Employee** radio button
    - **Last Name**: **Smith**
    - Click the **Continue** button
  - In the **Search Results** window:
    - Select the radio button for **Smith, Amy**
    - Click the **Continue** button
  - In the **Assign a role** window:
    - Select the radio button for **Key Person**
    - In the **Key Person's role** field, enter **Subaward PI**
    - Click the **Add Person** button

- Click the **Save** button
- Click the ► next to the name of the **Key Person: Subaward PI**

4 Click the **Save and Continue** button

## Exercise 8 – Adding Special Review / Compliance Information

| Step No. | Instructions |
|---|---|
| 1 | In the **Compliance** screen:<br>– Click the **+ Add compliance entry** button<br>o In the **Add Compliance Entry** window:<br>▪ **Type**: **Human Subjects**<br>▪ **Approval Status**: **Pending** |

        - Click the **Add Entry** button
  - Click the **Save** button

## Exercise 9 – Adding Attachments

| Step No. | Instructions |
|---|---|
| 1 | While in the Proposal, click the **Attachments** panel |
| 2 | In the **Attachments** screen → **Internal** tab:<br>− Click the + **Add** button<br>  o In the **Details** window:<br>    ▪ **Type**: **Complete Proposal Application**<br>    ▪ **Status**: **Complete**<br>    ▪ **Description**: **Complete Application**<br>    ▪ Click the **Choose File** button and upload **Proposal.pdf** file<br>    ▪ Click the **Save** button<br>− Click the **Upload & Add** button<br>  o In your computer search window locate the appropriate PDF files:<br>    ▪ **Solicitation.pdf**<br>    ▪ **SubSOW.pdf**<br>    ▪ Click the **Open** button<br>  o Select:<br>    ▪ **Type**: **Solicitation**<br>    ▪ **Type**: **Subrecipient Documentation** |

## Exercise 10 – Creating a Summary Budget

| Step No. | Instructions |
|---|---|
| 1 | While in the Proposal, click the **Budget** panel |
| 2 | In the **Budgets** screen:<br>− Click the + **Add Budget** button<br>  o In the **Budget Version** window select/enter:<br>    ▪ **Budget Name**: **My Summary Budget**<br>    ▪ **Would you like to create a detailed budget or enter a summary only?: Start a summary budget** |

▪ Click the **Create Budget** button

## Exercise 11 – Entering Summary Budget

| Step No. | Instructions |
|---|---|
| 1 | While in the **Budget → Periods & Totals** panel, click the **Budget Settings** link verify that the correct F&A Rate Type and Unrecovered F&A Rate type is selected (e.g. MTDC or TDC, etc.) If making changes, click the **Apply Changes** button; otherwise click the **Close** button |
| 2 | Complete the **Periods & Totals** panel as follows:<br>– **Period 1**<br>o Direct Cost: **100000**<br>o Indirect Cost: **57500**<br>– **Period 2**<br>o Direct Cost: **100000**<br>o Indirect Cost: **57752**<br>– **Period 3**<br>o Direct Cost: **100000**<br>o Indirect Cost: **58000**<br>– **Period 4**<br>o Direct Cost: **100000**<br>o Indirect Cost: **58000**<br>– **Period 5**<br>o Direct Cost: **100000**<br>o Indirect Cost: **58000**<br>Click the **Save** button |

## Exercise 12 – Marking Budget Version as 'Complete' and 'Final'

| Step No. | Instructions |
|---|---|
| 1 | While in the **Budget**, click the **Return to proposal** button |
| 2 | In the **Budgets** section for budget version 1:<br>– Click the **Actions** button and select **Complete Budget**<br>– Click the **Actions** button again and select **Include for Submission** |

## Exercise 13 – Other Budget Features: Adjusting Period Boundaries

| Step No. | Instructions |
|---|---|
| 1 | While in the **Proposal** → **Budget** panel:<br>− Click the + **Add Budget** button<br>  o In the **Budget Version** window select/enter:<br>    ▪ **Budget Name**: **Other Budget Features**<br>    ▪ **Would you like to create a detailed budget or enter a summary only?: Start a summary budget**<br>    ▪ Click the **Create Budget** button |
| 2 | Navigate to the **Periods & Totals** screen and modify the existing periods as follows:<br>*(**Note**: Our entire Project Period is 01/01/2020 – 12/31/2024)*<br>**Period 1**:<br>**Period Start Date: 01/01/2020**<br>**Period End Date: 09/30/2020**<br>**Period 2:**<br>**Period Start Date: 10/01/2020**<br>**Period End Date: 09/30/2021**<br>**Period 3:**<br>**Period Start Date: 10/01/2021**<br>**Period End Date: 09/30/2022**<br>**Period 4:**<br>**Period Start Date: 10/01/2022**<br>**Period End Date: 09/30/2023**<br>**Period 5:**<br>**Period Start Date: 10/01/2023**<br>**Period End Date: 09/30/2024** |
| 3 | Click the **Add Budget Period** button.<br>− In the **Add Budget Period Window** enter:<br>  o **Period Start Date: 10/01/2024**<br>  o **Period End Date: 12/31/2024**<br>  o Click the **Add Budget Period** button |

## Exercise 14 – Completing Questionnaire(s)

| Step No. | Instructions |
| --- | --- |
| 1 | While in the Proposal, click the **Questionnaire** panel |
| 2 | Complete each **Questionnaire** present<br>– Click the **Save** button |

## Exercise 15 – Completing Supplemental Information

| Step No. | Instructions |
| --- | --- |
| 1 | While in the Proposal, click the **Supplemental Information** panel |
| 2 | Complete the fields present<br>– Click the **Save** button |

## Exercise 16 – Sending Certification Request

| Step No. | Instructions |
| --- | --- |
| 1 | While in the Proposal, navigate to the **Key Personnel** → **Personnel** section |
| 2 | In the **Key Personnel** section:<br>– Click the **Notify <PI Name>** button |

## Exercise 17 – Validating Proposal

| Step No. | Instructions |
| --- | --- |
| 1 | While in the **Proposal** screen, click the **Data Validation** link |
| 2 | In the **Data Validation** window:<br>– Click the **Turn On** button |
| 3 | Review the displayed errors/warnings |
| 4 | Click the **Fix It** link for one of the errors/warnings |

## Exercise 18 – Submitting Proposal for Review

| Step No. | Instructions |
| --- | --- |
| 1 | While in the **Proposal** screen, navigate to the **Summary/Submit** section |
| 2 | In the **Summary/Submit** section:<br>– Click the View Route **Log** link |
| 3 | In the Route Log window:<br>– Click the **show** button next to Future Action Requests to view the proposal approval route path |
| 4 | Click the **X** button to close out of the Route Log |
| 5 | Click the **Submit for Review** button to route your proposal for review/approval |

## Exercise 19 – Accessing Proposal Returned for Corrections

| Step No. | Instructions |
|---|---|
| 1 | From the **Common Tasks** screen:<br>– Select **Search Proposals**<br>(the proposal is also going to be displayed in your Dashboard → Proposals Not Routing card) |
| 2 | In the **Development Proposal Lookup** window select/enter:<br>– **Proposal State**: **Revisions Requested**<br>– **Proposal State**: ***KR Training***<br>– Click the **search** button |
| 3 | In the displayed search results:<br>– Click the **edit** link to open one of the proposals |
| 4 | Navigate to the **Summary/Submit** screen and click the **View Route Log** link<br>***Note****: The revision comments included in the* ***Annotation*** *field next to the Approver that returned the proposal for correction* |

## Exercise 20 – Copying Proposal

| Step No. | Instructions |
|---|---|
| 1 | While in the **Proposal** click the **Copy** link located in the **Proposal Toolbar** |
| 2 | In the **Copy To New Document** window:<br>– **Lead Unit**: Select any Lead Unit you want to copy the proposal to<br>– **Budget?**: Check the checkbox if you want to copy the **budget**<br>– **Budget Version**: Select **All Versions** or Final **Version Only**<br>– **Attachments?**: Check the checkbox if you want to copy the **attachments**<br>– **Questionnaires?**: Check the checkbox if you want to copy the **questionnaire**(s) answers<br>– Click the **Copy…** button |