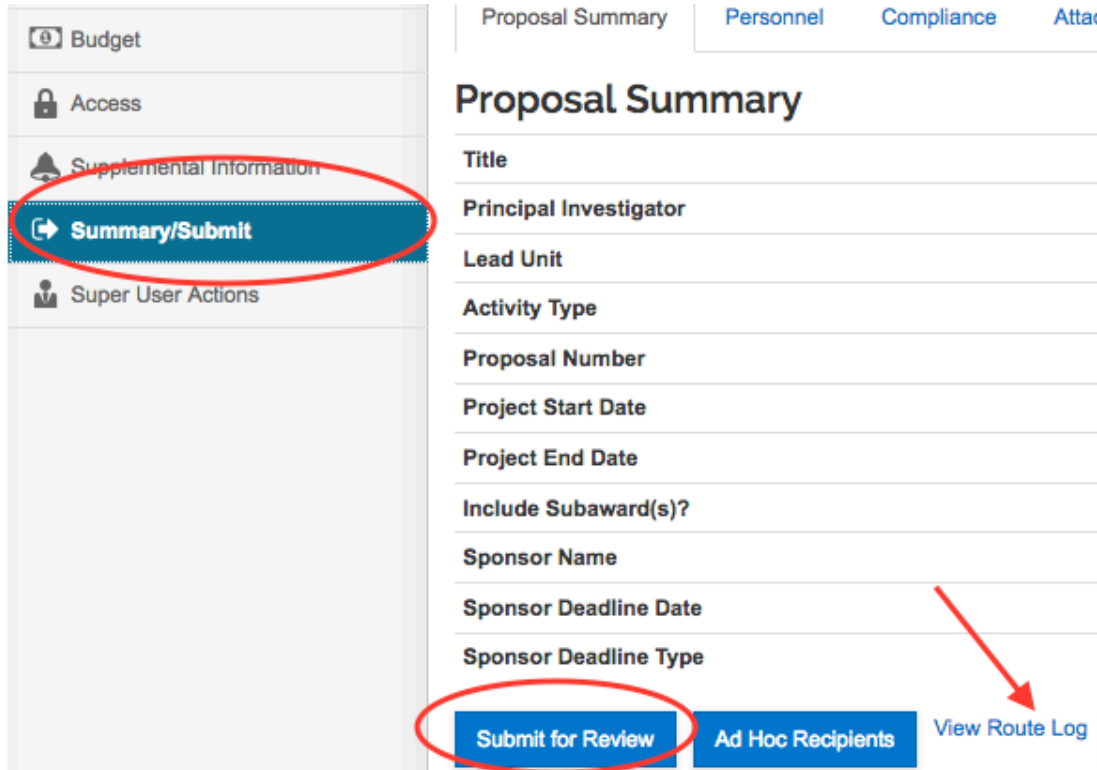


Proposal Approval in Kualu Research

Submit for Review (submit into approval routing)

After PI certifies and proposal passes all validations, initiator or PI selects the Summary/Submit section and clicks “Submit for Review” button at the bottom of the page.



To view the approval steps, select “View Route Log” link.

View Route Log: The Route Log will open in a pop-up window. At any time, before or after you submit for review, you may view the approval actions taken (where it has been), actions pending (where it is waiting), and future actions (where it will go).



Approver Notification

The approvers at the next approval stop will receive an email with the subject line “Action List Reminder” and text similar to this:

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

Document ID: 642412
Type: Add/Modify ProposalDevelopmentDocument
Deadline Date: 05/21/2018

PI: Princip L. Investigator

Sponsor: National Institutes of Health
Title: Demonstration Grant
Sponsor Announcement:

To respond to this eDoc:

Go to <https://umb-sbx.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=642412&command=displayActionListView>

To respond to this eDoc from your Action List:

Go to <https://umb-sbx.kuali.co/res/kew/ActionList.do>, and then click on the numeric Document ID: 642412 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):

Go to <https://umb-sbx.kuali.co/res/kew/Preferences.do>
Action Item sent to 57750052 : Solo, Han

Approver Process

- 1) LOG IN to Kuali Research
- 2) In the email message, select the first link, outlined in red above (“To respond to this eDoc:”)

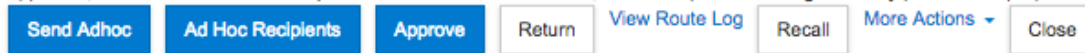
This action opens the proposal to the Summary/Submit section. The summary contains a high-level overview, and tabs across the page with detail.

Submit

The screenshot shows a progress bar with two segments: a green segment labeled "Saved" and a blue segment labeled "Routing". Below the progress bar is a navigation bar with the following tabs: "Proposal Summary" (highlighted), "Personnel", "Compliance", "Attachments", "Questionnaire", "Supplemental Info", and "Budget Summary".

3) After reviewing as needed on the Summary page, scroll to the menu at the bottom of the page.

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.




- Select “Approve” to move the proposal forward to the next approver
- If revisions are necessary, select “Return” to send the proposal back to the previous stop, or contact the PI or department and they can recall the proposal and make corrections. Click Return. In the pop-up window, add the Return Reason and click OK.
- Recall the proposal if appropriate. Select “Recall”. In the pop-up window add the reason for recall and click OK.

The menu includes the option to add an ad hoc approver. If an ad hoc approver is added, that person will be the NEXT approver after the current approver. As a general rule, adding an approver should not be necessary.

4) Upon approval, a message will appear on the screen that the document was successfully approved.

Submit

 Document was successfully approved.