Kuali Research 6.0

PART III: ADDING FINAL PIECES TO A KUALI PROPOSAL DEVELOPMENT RECORD
Proposal Creation: Final Proposal Pieces

The final components of a proposal record are optional for faculty to complete. These items are comprised of the following topics:

- Compliance
- Attachments

**ORSP Functional Buttons (ORSP Use Only):**

- Budget
- Access
- Supplemental Information
- Summary/Submit
- Super User Actions
The Compliance tab is used to capture ORIC activity, including the following:

- Animal Usage
- Biohazard Materials
- Human Subjects
- Export Control
- Intellectual Property
- Recombinant DNA
- Etc....

This information is by default captured in the Questionnaire and copied over by ORSP Staff. However, should a user want to complete this section, it is at their discretion to do so.
Proposal Creation: Final Proposal Pieces Compliance
Proposal Creation: Final Proposal Pieces Compliance

To enter compliance items:
- Select “Add Compliance Entry”
- Select from “Type” dropdown
- Select the status of the compliance entry (Approved, Pending, Exempt, Not Yet Applied) at the time of selection
- If appropriate, enter remaining fields (only Type and Status are required)
- Select “Add Entry”
- Repeat process for multiple compliance items
Proposal Creation: Final Proposal Pieces

Attachments

Proposal Attachments can be uploaded at any time during the proposal creation process. Attachments are uploaded by Category

1. Proposal
   i. Guidance
   ii. Project Narrative
   iii. Project Summary
   iv. References
   v. Facilities
   vi. Specific Aims
   vii. Etc.

2. Personnel
   i. Biosketch
   ii. Current and Pending

3. Abstracts
   i. S2S required abstracts
   ii. ORSP project summary

4. Internal (Emails, notes, memos)

5. Notes
Proposal Creation: Final Proposal Pieces
Attachments

UPLOAD OPTION A: BY ATTACHMENT TYPE

UPLOAD OPTION B: BY FILE NAME
Proposal Creation: Final Proposal Pieces

Attachments

UPLOAD OPTION C: DRAG AND DROP
Proposal Creation: Final Proposal Pieces

Attachments

Attachments Should be Uploaded By Category, in each distinct tab

Once uploaded, each attachment should have the following fields labeled:

1. Type (Most closely related)
2. Status (Complete or Incomplete)
3. Description (Required if “Other” Type is Selected)
### Proposal Creation: Final Proposal Pieces

#### Save & Close

**Attachments**

<table>
<thead>
<tr>
<th>File</th>
<th>Type</th>
<th>Status</th>
<th>Description</th>
<th>Uploaded By</th>
<th>Posted Timestamp</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
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<td>BudgetJustification.pdf</td>
<td>BudgetJustification</td>
<td>Complete</td>
<td></td>
<td>Rust, Raquel Garcia</td>
<td>06/20/2017 02:09 PM</td>
<td>Details, view/edit/notes</td>
</tr>
</tbody>
</table>
Final Proposal Tabs
ORSP-PreAward Coordinator Use Only

Budget
◦ Detailed budgeting to be completed by PreAward until future trainings

Access
◦ Permission based access for PreAward to enable additional viewers

Supplemental Information
◦ ORSP internal information, entered by PreAward

Summary Submit
◦ Routing Initiation – To Be Completed by PreAward Only

Super User Actions
◦ PreAward Use Only Due to University AOR Roles