**Tutorial on Uploading and Reviewing Research Lab and Field Research SOP Plans Using Texas State Ready (Kuali Ready) System**

**IMPORTANT NOTE: LAB MANAGERS MUST FIRST EMAIL THEIR TEXAS STATE NET ID AND DEPARTMENT NAME TO** **YS11@TXSTATE.EDU** **IN ORDER TO ACCESS THE KUALI PORTAL.**

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## **Step 1 – Access the Texas State Ready Page**

1. Open an Internet browser (the site works best on Chrome)
2. Login to the Texas State Ready Dashboard <https://txstate.kuali.co/ready/dashboard>



1. From the Dashboard, under **My Plans**, locate the plan named “**ACAD – Continuity of Research Work Group”**



## **Step 2 – Locate Repository of Department and Center Plans**

Click the “**Continuity of Research Work Group**” and then select the “**Critical Functions**” tab in the top center of the page.



## **Step 3 – Locate Specific Department or Center**

From the “**Critical Functions**” tab, locate the department/center you want to interact with from the list in the center and click the “**View**” button on the right.



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## **Step 4 – Locate the “Documents” for the chosen Department/Center**

From within the chosen department/center page, navigate to and select the “**Documents**” tab on the left.



## **Step 5A – Document Entry and Update by the Head of a Research Lab**

1. Upload a SOP Document
2. From within the department/center’s document page, select “**Edit Page**” on the right.



1. Select “**Add Document**” to add a researcher filled out SOP template.



1. In the “**New Document**” window, fill out the form as follows:
	1. Name: ***[Researcher’s name]\_Lab***

Note: You do not need to fill in other boxes

* 1. Drag and Drop into or click the box with the label “**Attachment**” at the bottom to upload the researchers filled out SOP.



* 1. Select “**Save**”



2. Update a SOP Document

\*Any edits of an individual’s plan after it has been uploaded will have to be done by the author outside of the system and re-uploaded to the department/center documents page.

1. Locate the document and click the “edit” button.

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2) Click the Attachment box to upload a new SOP document.

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2. Delete a SOP Document

Locate the document and click the “delete” button.



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## **Step 5B – Document Viewing – Reviewers**

* Listed in the “**Documents**” tab will be all the plans uploaded in for review.
* Locate the researcher plan you would like to review and select “**View**” to the right of it.

