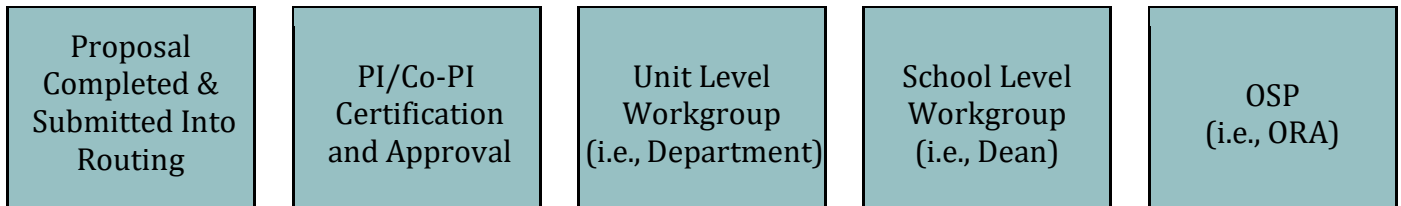


QUICKSTARTGUIDE



Approver View in Kuali Coeus: Proposal Development Document

Proposal Routing and Approval Path



Proposal Approval and Routing

Users in the routing and approval path shown above will receive an email notification and a document in their KC/KFS Action Lists.

STEP 1: EMAIL NOTIFICATION:

To access the proposal development document, click on the eDoc or Action List link.

To receive email notification of your proposal submission into routing, you must first set-up your Workflow notification preferences. (See *Editing Your Workflow Email Preferences within Kuali Coeus Supplemental Guide* for more information.)

Below is an example screen shot of the email notification.

From: ONESTART WORKFLOW
Subject: **Action List Reminder**
Date: May 23, 2011 10:29:26 AM EDT
To: Neal Chen <nichen@indiana.edu>

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

Document ID: 8203844
Initiator: Chen, Neal
Type: Add/Modify ProposalDevelopmentDocument
Title: Proposal Development Document - test; Proposal No: 42; Due Date: 2012-06-15; PI: Terrence Andrew Durkin; Sponsor: AMERICAN ACADEMY OF PEDIATRIC DENTISTRY

To respond to this eDoc:
Go to <https://test.uisapp2.iu.edu/kc-cnv/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=8203844&command=displayActionListView>

Or you may access the eDoc from your Action List:
Go to <https://test.uisapp2.iu.edu/kr2-cnv/kew/ActionList.do>, and then click on the numeric Document ID: 8203844 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):
Go to <https://test.uisapp2.iu.edu/kr2-cnv/kew/Preferences.do>

For additional help, email <<mailto:workflow@indiana.edu>>

Action Item sent to tdurkin

eDoc and Action List links

Sample Email Notification

QUICKSTARTGUIDE



Approver View in Kuali Coeus: Proposal Development Document

STEP 2: PI/CO-PI APPROVER VIEW

The emailed link will open in Kuali Coeus at the Approver View screen as shown below. The PI and/or CO-PI must answer the five Certification Questions and click on the Approve or Disapprove button. Details of the proposal may be viewed by clicking on any tab.

Project Title: Sharing Approver View Details to Help Users	Amounts: Total Direct Cost: \$5,000,000.00
Proposal No.: 135801	Total F&A Cost: \$2,925,000.00
Proposal Type: New	Total All Cost: \$7,925,000.00
Activity Type: Research	Dates: Proposal Due Date: 06/07/2021
Sponsor: NATIONAL SCIENCE FOUNDATION	Start Date: 01/01/2022
Lead Unit: BL-SOC	End Date: 12/31/2026
Required Research Protocols: None Indicated	PI: Pescosolido, Bernice A.

Proposal Person Certification (Incomplete) hide

hide Questions print ?

I certify that (1) all information provided in this request or application is true, complete and accurate to the best of my knowledge and (2) I understand that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil or administrative penalties.
 Yes No

I certify that I agree to accept responsibility for the scientific conduct of the project, to provide the required progress reports, and to comply with the terms and conditions of the sponsoring agency.
 Yes No

Do you have a financial conflict of interest related to this project? For help, see <https://research.iu.edu/compliance/conflict-interest/index.html>
 Yes No

If application is to a federal or federal pass-through sponsor, have any lobbying activities been or will any be conducted regarding this proposal? If not applicable, please answer no.
 Yes No

Are you currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency?
 Yes No

update

PI/CO-PI Approver View

NOTE: Principal Investigators and Co-Principal Investigators will see the Certification Questions in their Approver View. If the Principal Investigator or Co-Principal Investigator initiated the Proposal Development document, they will need to complete the Certification questions within the document prior to submitting the document into routing. The Certification Questions are located on the Key Personnel Tab, under the individual's "Certify" SubPanel.

QUICKSTARTGUIDE



Approver View in Kuali Coeus: Proposal Development Document

STEP 3: DEPARTMENT CHAIRS, DEAN, DIRECTOR (OR DELEGATES) APPROVER VIEW

The emailed link will open in Kuali Coeus at the Approver View screen as shown below. Details of the proposal may be viewed by clicking on any tab. As Approvers, the Department Chair, Dean, Director (or Delegates) will not see the PI/Co-PI Certification Questions or answers in their Approver View.

Click on the Approve or Disapprove button.

Department Chair, Dean, or Director Approver View.

NOTE: This step provides an opportunity to review details of the proposal development document by clicking on any of the tabs.

If you are confident that the proposal is correct and accurate, click the Approve button.

ADDITIONAL INFORMATION: APPROVE OR DISAPPROVE BUTTONS

Click the Approve button once you are satisfied with the document. This action advances the proposal development document to the next step in the routing process.

Click the Disapprove button if the proposal is incorrect, incomplete, or should not be submitted. If you disapprove the document, the proposal will cease further routing. The document initiator and any previous approvers receive an Acknowledgement action request, informing them that the document has been disapproved. Disapproved documents can be templated (by the Initiator) and used as the basis for a new version. The person who disapproves the document must add a note indicating reason/justification for disapproval.



Approve and Disapprove Buttons