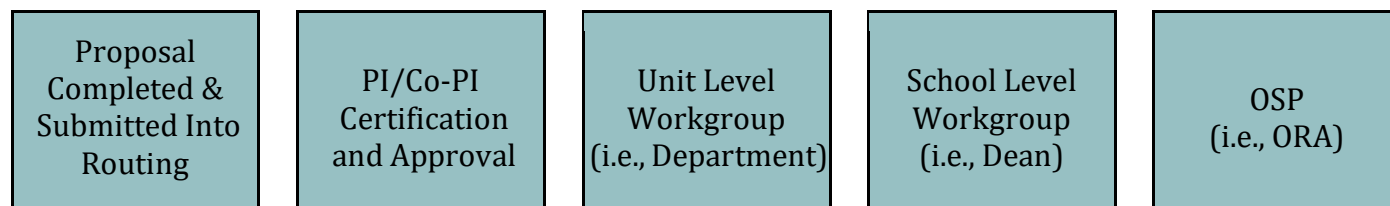


QUICK START GUIDE



Kuali Coeus: Proposal Development Document Overview

Proposal Routing and Approval Path

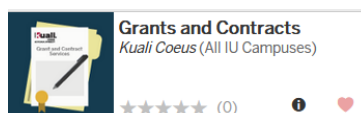


Proposal Approval and Routing

Users in the routing and approval path shown above will receive an email notification and a document in their KC/KFS Action Lists. This quick guide provides a high level of instruction. *For more details, please review the video guides for the proposal module.*

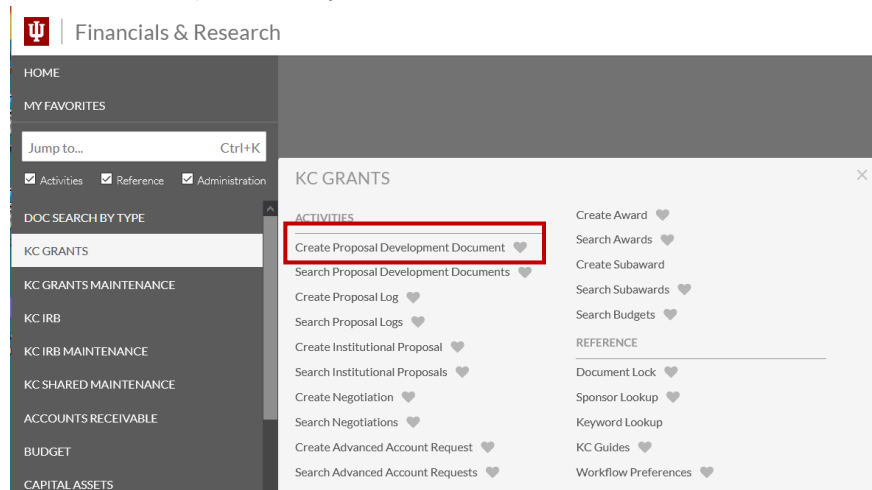
STEP 1: Initiate the document:

To access the proposal development document, locate the Financials and Research dashboard.



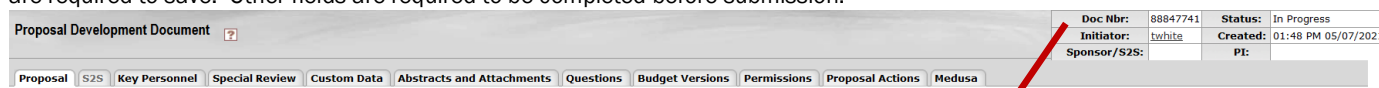
icon in One.IU and click to open the

Locate the KC Grants section and select the *Create Proposal Development Document* from the list. You may want to mark the selection with the 'like' emoji to add it to your favorites.



STEP 2: The Proposal Development Document

The document will open to the proposals tab. The multiple tabs indicate sections of the document to fill out. Not every tab is required and not every field is required. Some fields are needed only for specific types of proposals. Some fields are asterisked to indicate they are required to save. Other fields are required to be completed before submission.



NOTE: Make a note of the document number located in the dialogue box in the top right-hand corner of the document, so you may easily locate the document if you need to save and return to it later.

Doc Nbr:	88847741	Status:	In Progress
Initiator:	twwhite	Created:	01:48 PM 05/07/2021
Sponsor/S2S:		PI:	


QUICKSTARTGUIDE

Kuali Coeus: Proposal Development

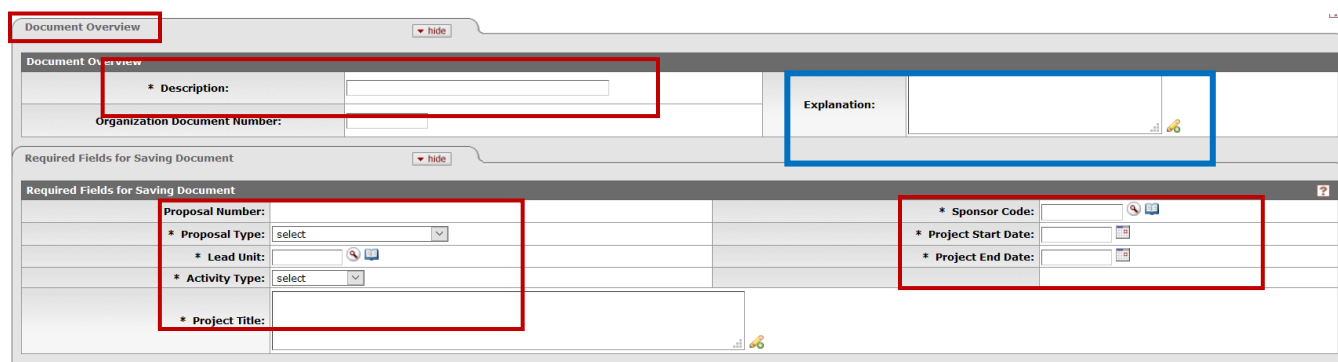
STEP 3: The Proposal Tab: Fields Required to Save

The document opens to the proposal tab. The fields required to save the document are asterisked and located in the subpanels. Once the document is saved, **Lead Unit cannot be changed**, even by ORA staff. Once the document is submitted, the Sponsor Deadline Date can only be updated by ORA staff. Complete the following fields to save the document:

- **Description**
- **Proposal Type**
- **Lead Unit**
- **Activity Type**
- **Project Title**
- **Sponsor Code**
- **Project State Date**
- **Project End Date**
- **Sponsor Deadline Date**
- **Sponsor Deadline Type**

Notes to reviewers should be placed in the Explanation box. To locate the sponsor code, click  the magnifying glass beside the field and a lookup will open, allowing you to 'return the value' for your Sponsor and Prime Sponsor. See other QuickStart guides for detailed information on lookups.

Asterisks and **red** outlines below mark fields on this tab that must be completed to save the document. Once saved, the document can be closed and accessed later for completion of the proposal information. Additional information in other subpanels on this tab will be needed to submit into routing; however, not every field is required to submit. The Explanation box is an important place to add information for ORA staff and is outlined in **blue**.



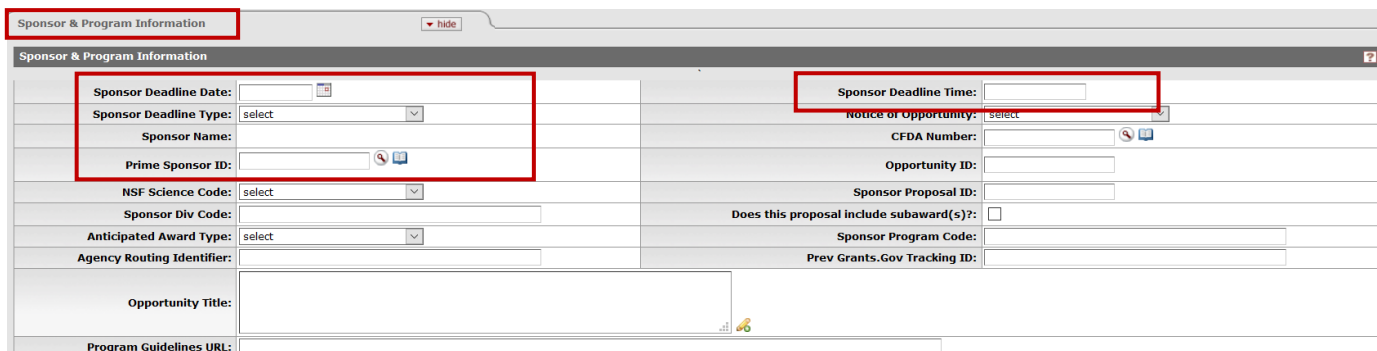
After completing the required fields, click the save button at the bottom of the tab.



Going forward in this document, "Required to submit" fields will be outlined in **red**. **Blue** will signal fields that may be applicable to the project. Once the proposal tab has been saved, you may navigate through the tabs in any order as information becomes available.

The Proposal Tab: Additional Fields Needed For Submission

Submission date and time are necessary to submit the document into routing. Other fields in this subpanel are useful in speeding up the review process. If the funding has a prime sponsor, add them here. If the prime sponsor is incorrectly entered or missed, it could cause delays. *Example:* Dr. X is working with her colleague Dr. Y from Purdue on a project seeking funding from NSF. Purdue will apply directly to NSF and issue IU a subaward. *NSF is the Prime sponsor in this example.*



QUICKSTARTGUIDE

Kuali Coeus: Proposal Development

The *Other IU Units* section is completed by KC when the *Personnel* tab is completed. If there are additional IU units involved, please add them.

Add any subawards to external entities on the Subaward panel. Include the period 1 budgeted amount. Vendors are not included here. (See the video series for details on routing and the subaward video series concerning subawards vs. vendors.) *Example:* If IU were submitting to NSF and plans to issue a subaward to Purdue, we would list Purdue here.

Delivery information should be included in the next subpanel. Most submissions are electronic and submitted by ORA, but any hard copy requirements are the responsibility of the unit to submit once final approval is given. The Keywords panel is not used by ORA.

STEP 4: The Key Personnel Tab

The document self-saves when you migrate from tab-to-tab, so additional 'saves' after the first save are not needed. Skip the tab marked **S2S**. IU does NOT use this feature. Click on the Key Personnel tab and the document will auto-save before opening the tab.

Using the magnifying glass lookup feature, select the project participants one at a time, and add them to the list.

Be sure to click the ADD PERSON button after choosing the roles. Note the color shading change that helps remind you to click add.

The investigator names will appear in different colors to indicate their Conflict of Interest (COI) status. Those whose forms are expired appear in **red** and need updated in the COI system. **Green** and **purple** names signal a valid COI is on file.

QUICKSTARTGUIDE

Kuali Coeus: Proposal Development

The *Combined Credit Split* subpanel at the bottom of the page is required and can be completed using the default distribution. Check with your School and Investigators for other distributions. (See the video series for details on other distribution entries.)

	F&A Revenue	Intellectual
Luehring, Frederick C	100.00	100.00
BL-PHYS - PHYSICS	100.00	100.00
Unit Total:	100.00	100.00
Totals		
Investigator Total:	100.00	100.00

STEP 5: The Special Review Tab and the Custom Data Tab

The *Special Review tab* is designed to manage information concerning human subjects, animal use, or bio-hazardous materials related to the project. Enter the necessary information or choose None Indicated if none of the listed items are required for the project. Approval status may be pending or not yet applied. Be sure to click ADD so additional lines appear if multiple types are required. At least one entry will be required to submit into routing. The entry must match the proposal submitted.

	* Type	* Approval Status	IU Protocol ID	Application Date	Approval Date	Expiration Date	Exemption #	Actions
Add:	select	select					E1 E1B E2	add
1	None Indicated	None					E1 E1B E2	delete

The *Custom Data tab* is generally reserved for use by ORA staff and completed once the document has routed to ORA; however, some fields may be useful for the document initiator to fill in. A supplement can be reviewed more quickly if the existing account number is included. Also, Limited Submissions Approval Numbers should be entered here. Other fields on the Custom Data tab are used by the ORA staff for codes and approvals needed for institutional records.

Account ID(s):	
Limited Submission Number:	N2480-9905
Proposal sIRB Approval Required:	N/A

STEP 6: The Abstracts and Attachments Tab

Documents to be submitted to the sponsor or are needed for internal purposes must be attached to this tab. Do not route a KC Proposal Development Document without the necessary attachments.

	* Attachment Type	* File Name	Contact Name	Email Address	Phone Number
1	select	Browse... No file selected.			

Be sure to indicate the attachment type for each document and click to add. Browsing for files is enabled. Compiling one document for submission is encouraged. Different versions may be added here while constructing the proposal to share securely with IU staff or investigators; however, only the final versions should be routed.

	* Attachment Type	* File Name	Contact Name	Email Address	Phone Number
1	select	Browse... No file selected.			

QUICKSTARTGUIDE

Kuali Coeus: Proposal Development

Internal attachments are not submitted to the sponsor but needed as part of an ORA review. Internal budgets, subaward documents and guidelines are to be attached on that subpanel. Notes entered on this tab are part of the permanent record.

Internal Attachments (2) [show](#)

Abstracts (0) [show](#)

Notes (0) [show](#)

STEP 7: The Questions Tab and The Permissions Tab

The Questions Tab items can best be answered by working with the investigator since they relate specifically to the proposal. Some questions ask for additional details when the answer is yes.

Proposal Questions (Complete) [hide](#)

[hide](#) Questions [print](#) [?](#)

Does the proposed project involve human embryonic stem cells?
☐ Yes ☒ No [More Information...](#)

Is proprietary/privileged information included in the application?
☐ Yes ☒ No [More Information...](#)

Check "No" if no inventions were conceived or reduced to practice during the course of work under this project. Check "Yes" if any inventions were conceived or reduced to practice during the previous period of support.
☐ Yes ☒ No [More Information...](#)

Will new space or remodeling be required for this project?
☐ Yes ☒ No [More Information...](#)

Are other IU campuses, schools, or units involved? If Yes, add unit(s) to Other IU Unit(s) subpanel in the Organization/Location panel of the Proposal tab. You do not need to add additional units for a Co-PI, PI/Multiple or Key Persons.
☐ Yes ☒ No [More Information...](#)

Does this project have an international connection: that is, collaboration with internationally-based colleagues or institutions; significant activity outside the United States; or pertain topically to countries, regions or populations outside the United States? If so, please indicate in the explanation field the countries with which it is connected. (Used by the International Affairs Office.)
☐ Yes ☒ No [More Information...](#)

Are human or non-human primate anatomical substances used (includes tissues, cells, and fluids)?
☐ Yes ☒ No [More Information...](#)

If this proposal is federal or federal pass-through, is this a multi-site study that will use the same protocol to conduct non-exempt human subjects research at more than one domestic site? Answer Yes or No. If not federal or federal pass through, answer NA. If you answered Yes, please contact the Human Subjects Office (HSO) immediately.
☐ Yes ☒ No ☐ NA [More Information...](#)

Does this project relate to COVID-19?
☐ Yes ☒ No [More Information...](#)

[update](#)

The Permissions Tab is used to provide additional access to the document for adding, editing, or sharing of proposal documents. Other users may be added as Aggregators with edit permissions or Viewers with view only permission. Once the document has been submitted into routing, users can only be added as Viewers.

Approver View Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions **Permissions** Proposal Actions Medusa

Assigned Roles [hide](#)

[view permissions](#)

Assigned Roles

Viewer:

Budget Creator:

Narrative Writer:

Aggregator: Bruns, Elaine; Makarchuk, Laura L

Unit Aggregator:

Contact Person:

Users [hide](#)

Users	* User Name	Full Name	Unit #	Unit Name	Role	Actions
Add:	<input type="text"/>				<input type="text"/>	add
morris		Bruns, Elaine	UA-RSCH	RESEARCH ADMINISTRATION	Aggregator	edit role delete

STEP 8: The Budget Versions Tab

KC is designed to allow a detailed budget and to have multiple versions of the budget. IU has elected to use only the parameters page of the budget. Enter a budget name and click ADD.

Approver View Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions **Budget Versions** Permissions Proposal Actions Medusa

Budget Versions (06/01/2021 - 05/31/2024) [hide](#)

Budget Versions	Version #	Direct Cost	F & A	Total	Budget Status	Final	Actions
Add: <input type="text" value="nap budget"/>							add reset

QUICKSTARTGUIDE

Kuali Coeus: Proposal Development

The open button appears, and you may open to the parameters page of the budget.

▼ hide nap budget 1 0.00 0.00 0.00 select ☐ open copy

Note that the budget module is actually a separate Kuali document with its own document ID. IU uses only the *Parameters* tab and the *Distribution and Income* tab which is reserved for cost share information. (See videos for cost share entry actions.) KC creates budget periods based on the project start and end dates. These can be edited or combined as needed for the project. One budget period is required and also acceptable if it meets the sponsor guidelines. Use the delete buttons to eliminate rows and edit the dates as needed. After the periods are correct, enter the direct and indirect amounts and click recalculate. Then mark as Final and change the *Budget Status* to Complete. Next, click Save and then select <return to proposal.

Budget Versions Parameters Rates Summary Personnel Non-Personnel Distribution & Income Modular Budget Budget Actions

< return to proposal

Budget Overview

▼ hide

Budget Overview

Project Start Date: 06/01/2021 Project End Date: 05/31/2024

Total Direct Cost Limit: 0.00

Budget Status: Incomplete Final? ☐ On/Off Campus: Default

Modular Budget? ☐ Residual Funds: Total Cost Limit: 0.00

Unrecovered F & A Rate Type: MTDC F&A Rate Type: MTDC Submit Cost Sharing? ☒

Comments:

Budget Periods & Totals

▼ hide

	Period Start Date	Period End Date	No. of Months	Total Sponsor Cost	Direct Cost	F&A Cost	Unrecovered F&A	Cost Sharing	Cost Limit	Direct Cost Limit	Actions
Add:				0.00	0.00	0.00	0.00	0.00	0.00	0.00	add
1	06/01/2021	05/31/2022	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	delete
2	06/01/2022	05/31/2023	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	delete
3	06/01/2023	05/31/2024	12.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	delete
Totals	06/01/2021	05/31/2024	36.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	recalculate

generate all periods calculate all periods default periods save reload close

STEP 9: The Proposal Actions Tab and Submission

The final step is to validate the data and correct any errors before submission into routing. Navigate to the *Proposal Actions* tab and expand the data validation subpanel. Click Turn on Validation. Errors will be listed, and a fix button will allow quick movement to the area where the error exists. Once fixed, you will be returned to the Proposal Actions tab where you may submit the document into routing for approvals by the Investigator, Dept Chairs, Deans, and ORA.

Approver View Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions Permissions Proposal Actions Medusa

Data Validation

▼ hide

Data Validation

You can activate a Validation check to determine any errors or incomplete information. The following Validations types will be determined:

- errors that prevent submission into routing
- warnings that serve as alerts to possible data issues but will not prevent submission into routing
- errors that prevent submission to grants.gov

turn on validation

Validation Errors

▼ hide Proposal Questions (1)

You must complete the questionnaire "Proposal Questions"

submit save reload close cancel

fix