ESR Enterprise Systems Renewal

Kuali Research Administration Project

Learning Lab Exercises

Non-S2S Proposal Development Opportunity with Summary Budget

For more information about training opportunities visit:

esr.ucsd.edu/projects/kuali-research/opportunities

Or, contact the Kuali Research team at:

esr-researchadmin@ucsd.edu

Exercise 1 – Creating a Proposal

1	From the left-hand navigation: - Click on **Common Tasks** - In Common Tasks, select **Create Proposal** under the **Proposal Development** section
2	In the **Create Proposal** window select/enter: – **Proposal Type**: **New** – **Lead Unit**: **Select your lead unit** – **Activity Type**: **Basic Research** – **Project Dates**: **09/01/2021** (start date) and **08/31/2023** (end date) – **Project Title**: **My Important Project – <enter your initials>** – **Sponsor**: **American Heart Association (AHA) (8056)** *(**Quick Tip**: you can start typing the sponsor name in the sponsor field and the available options for selection will display)* – **Sponsor deadline**: **08/16/2021** – **Sponsor Deadline Type**: **Hard Deadline** – **Anticipated Agreement Type**: **Grant** – Click the **Save and Continue** button
3	The **Proposal** will open with the display defaulted to the **Proposal Details** screen.

Exercise 2 – Assigning Proposal Roles

1	While in the Proposal, click the **Access** panel
2	In the **Permission** screen: – Click the **Add User** button – In the **Add Permission** window, search for and return **admin** – **Assign a role**: **Aggregator Document Level** – Click the **Add Permission** button
3	Click the **Save** button at the bottom of the **Permissions** screen.

Exercise 3 – Completing Delivery Info

1	In the **Delivery Info** screen under **Basics**: – **Submission By**: **OSP** – **Submission Type**: **Electronic** – **Submission description: Submit via Grants@Heart online system**

- Click the **Save and Continue** button

Exercise 4 – Completing Sponsor & Program Information

1 In the **Sponsor & Program Information** screen select/enter:
- **Notice of Opportunity**: **Non-Federal Solicitation**
- Click the **Save and Continue** button

Exercise 5 – Adding Key Personnel, Updating Details

1 While in the Proposal, select **Key Personnel** → **Personnel** subpanel

2 In the **Key Personnel** screen:
- Click the **Add Personnel** button
  - In the **Add Personnel** window:
    - Select **Employee** radio button
    - **Last Name**: **Helinski**
    - **First Name: Donald**
    - Click the **Continue** button
  - In the **Search Results** window:
    - Select the radio button for **DONALD HELINSKI**
    - Click the **Continue** button
  - In the **Assign a role** window:
    - Select the radio button for **Principal Investigator**
    - Click the **Add Person** button
- Click the ▶ next to the name of the **Principal Investigator**
- Click the tabs to view information
- Click the **Unit Details** tab and review the Units associated with the PI
- Click the **Save** button

3 Click the **Save and Continue** button

Exercise 6 – Adding Special Review / Compliance Information

1

In the **Compliance** screen:

- Click the **+ Add compliance entry** button
  - In the **Add Compliance Entry** window:
    - **Type**: **Human Subjects**
    - **Approval Status**: **Pending**
    - Click the **Add Entry** button
- Click the **Save** button

Exercise 7 – Adding Attachments

1 While in the Proposal, click the **Attachments** panel

2 In the **Attachments** screen → **Internal** tab:

- Click the **+ Add** button
  - In the **Details** window:
    - **Type**: **Complete Proposal Application**
    - **Status**: **Complete**
    - **Description**: **Complete Application**
    - Click the **Choose File** button and upload **Proposal.pdf** file
    - Click the **Save** button
- Click the **Upload & Add** button
  - In your computer search window locate the appropriate PDF files:
    - **Solicitation.pdf**
    - Click the **Open** button
  - Select:
    - **Type**: **Solicitation**
- Click the **Save and Continue** button

Exercise 8 – Creating a Summary Budget

1 While in the Proposal, click the **Budget** panel

2 In the **Budgets** screen:

- Click the **+ Add Budget** button
  - In the **Budget Version** window select/enter:
    - **Budget Name**: **Summary Budget V1**
    - **Would you like to create a detailed budget or enter a summary only?: Start a summary budget**
    - Click the **Create Budget** button

Exercise 9 –Updating Periods & Totals

1	While in the **Budget**, click the **Budget Settings** link to verify that the correct F&A Rate Type and Unrecovered F&A Rate type is selected (e.g. MTDC or TDC, etc.) If making changes, click the **Apply Changes** button; otherwise click the **Close** button
2	Click the **Periods & Total** panel – Verify that the project period breakdown is correct – To make an update, you can click in the **Period Start Date and End Date** fields and enter the appropriate dates – Enter values for the **Total Sponsor Cost**: – Period 1: $62,805.00 – Period 2: $65,033.00 – Period 3: $67,311.00 – Period 4: $69,629.00 – Period 5: $72,078.00 – Enter Values for the **Direct Cost** – Period 1: $39,855.00 – Period 2: $41,160.00 – Period 3: $42,602.00 – Period 4: $44,069.00 – Period 5: $ 45,619.00 – Enter Values for the **F&A Cost** – Period 1: $22,950.00 – Period 2: $23,873.00 – Period 3: $24,709.00 – Period 4: $25,560.00 – Period 5: $26,459.00 – Click the **Save** button
3	Click the **Rates** panel – Verify that the Applicable Rate information is correct – To make an update, click in the **Applicable Rate** field and enter the appropriate rate – Override the **MTDC On Campus** "**Yes**" fields to set the **Applicable Rate** to the AHA limit of 10% in both FY 2020 and FY 2022 – Click the **Save** button

Exercise 14 – Marking Budget Version as 'Complete' and 'Final'

1 While in the **Budget**, click the **Return to proposal** button

2 In the **Budgets** section for budget version 1:

- Click the **Actions** button and select **Complete Budget**
- Click the **Actions** button again and select **Include for Submission**

Exercise 15 – Completing Questionnaire(s)

1 While in the Proposal, click the **Questionnaire** panel

2 Complete each **Questionnaire** present

- Click the **Save** button

Exercise 16 – Completing Supplemental Information

1 While in the Proposal, click the Supplemental Information panel

2 Click the magnifying glass to the right of the COA Financial Unit field

- Enter the unit name surrounded by asterisks: ***physics***
- Click the Search button
- Click the Select button next to the correct unit
- Click the Save button

Exercise 17 – Sending Certification Request

1 While in the Proposal, navigate to the **Key Personnel** → **Personnel** section

2 In the **Key Personnel** section:

- Click the **Notify Donald Helinski** button

Exercise 18 – Validating Proposal

1 While in the **Proposal** screen, click the **Data Validation** link

2 In the **Data Validation** window:

- Click the **Turn On** button

3	Review the displayed errors/warnings
4	Click the **Fix It** link for one of the errors/warnings Complete the Certification/Research Questions on the PI's behalf for this training so the proposal can be submitted.

Exercise 19 – Submitting Proposal for Review

1	While in the **Proposal** screen, navigate to the **Summary/Submit** section
2	In the **Summary/Submit** section:
	– Click the **View Route Log** link
3	In the Route Log window: – Click the **show** button next to Future Action Requests to view the proposal approval route path
4	Click the **X** button to close out of the Route Log
5	Click the **Submit for Review** button to route your proposal for review/approval