ESR Enterprise Systems Renewa

Kuali Research Administration Project

Learning Lab Exercises

Proposal Hierarchy

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 – Create a Hierarchy

For this exercise, you should create two proposals, each with:

- The same **Project Dates**
- The same **Sponsor**
- A PI you work with added in the **Key Personnel** section for each proposal
- A **Budget** in each proposal (the budgets do not need to be complete, just created)

1 While in one of the Proposals you have just created, click the **Hierarchy** button at the top of the toolbar

2 In the Hierarchy window:

- Hierarchy Budget Type: **Sub-Budget**
- Click **Create Hierarchy**

3 Notice there is now a **C** next to the **Hierarchy** button for Child

- Select the **Summary/Submit** section
- Click on the **Hierarchy** tab
- View the **Child** and **Parent Proposal Hierarchy**
- Click on **View Document** under the Parent Proposal

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- Click the **Hierarchy** button at the top of the toolbar
- In the **Link Proposal** Field, enter the other proposal number you created that you would like to include as a child
- Hierarchy Budget Type: **Sub-Budget**
- Click **Link a Child to this Parent**

Exercise 2 – Syncing the Budget

1 While in the **Parent Proposal**:

- Click on the **Summary/Submit** section
- Click the **Hierarchy** tab
- Click **View Document** under a **Child Proposal**

In a **Child Proposal**

- Click on the **Budget** Section
- Select your **Budget**
- Navigate to the **Non-Personnel Costs** section

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- Click the **Assign Non-Personnel** button
- Category Type: **Travel**
- Category: **Travel – Domestic**
- Object Code Name: **Travel-in-state**
- Total Base Cost: **$3,000**
- In the description, enter the **PI's last name – Travel**
- Click **Add non-personnel item to 1**
- Click **Save**
- Click the **Hierarchy** button at the top of the toolbar and select **Sync Budget**

Exercise 3 – View the Sync Updates

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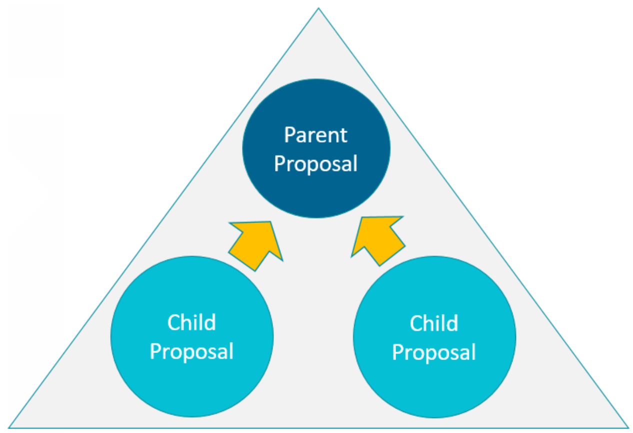
- Navigate back to the proposal by clicking **Return to Proposal**
- Click on the **Summary/Submit** section
- Select the **Hierarchy** tab
- Click **view document** under the **Parent Proposal**
- Navigate to the **Budget** section
- Select and enter into the **Hierarchy Budget**
- Navigate to the **Non-Personnel Costs** section
- View the Travel expense that was synced from the **Child Proposal** to the **Parent Proposal**

What is Proposal Hierarchy?

Multiple proposals linked to one main/parent proposal.

Creates:
- Ease when collaborating with other departments
- More accurate for budgeting



Before creating a Hierarchy, keep in mind:

- All the child proposals must have the same project dates
- Users must have the Aggregator role on the Parent Proposal to link their child proposal to the hierarchy
- The PI of the child proposal that created the parent is automatically the lead PI of the parent proposal and the hierarchy.
- The lead unit (department) of the child proposal that created the parent will be the lead unit (department) of the parent proposal.

Parent vs Child – what goes where?

Parent:
- Notify PI's of certification/research questions in the parent
- Answer questionnaires
- Upload the attachments
- Enter compliance/special review data

Child:
- Enter and edit budgets
- Record and edit Personnel Details