Proposal Development Training Exercises

University of Alabama - Huntsville
Exercise 1 – Logging In

1. Navigate to www.uah.edu/osp and click on the Kuali Login Banner

![Kuali Login Banner](image)

2. Enter your username and password

![Login Page](image)

Exercise 2 – Completing the COI /Disclosure

1. Kuali opens to the Dashboard. Expand the menu on the left side of the screen by clicking the Collapse Tab (≡)

![Dashboard](image)
2. From the left hand navigation panel click on Common Tasks

3. In the Common Tasks section under COI click My Disclosures

4. In the My Disclosures section click Create Disclosure
5. Answer the questions and click Next

6. Once all questions have been answered on the multiple screens, click Submit

7. Once completed, a Print option will appear
8. Annual Disclosure Status will update and reflect “Approved”

Exercise 3 – Initiating a Proposal

1. Kuali opens to the Dashboard. Expand the menu on the left side of the screen by clicking the Collapse Tab (>)

2. From the left hand navigation panel click on Common Tasks
3. In the Proposal Development window, select Create Proposal

4. In the Create Proposal window select the following information:
   - Proposal Type: New
   - Lead Unit: 233100 – Civil and Environmental Engineering
   - Activity Type: Research - Applied
   - Project Dates: 9/01/2019 (start date) and 08/31/2024 (end date)
   - Project Title: My Important Project – <enter your initials>
   - Sponsor: NIH

   NOTE: All sections with an asterisk (*) must be completed.

5. Click Save and Continue
6. The proposal will open with the display defaulted to the Proposal Details screen.

The proposal number to the left (#75) is an internal number used to record working proposals.

NOTE: The Prime Sponsor can be searched by name or by the designated code number.
Exercise 4 – Selecting System-to-System (S2S) Opportunities

1. In the S2S Opportunity screen, if the opportunity is available in Grants.gov then the required documents can be added to the proposal for submission and data validation in this section. Click the Find an Opportunity button.

2. If the Opportunity ID is unknown, perform a search by selecting the magnifying glass.
Exercise 5 – Completing Delivery Information (OSP Only)

In the Delivery Info screen, select the method of delivery for the proposal and complete the relevant information. This section is optional.

Exercise 6 – Completing Sponsor & Program Information

1. In the Sponsor & Program Information screen select/enter the following:
   - Sponsor Deadline: 10/05/2019 12:00 p.m.
   - Sponsor Deadline Type: Receipt
   - Notice of Opportunity: Federal Solicitation
   - NSF Science Code: Biological and Biomedical Sciences—Life Sciences: D.02
2. Enter the CFDA number: 93.859 and click ADD
3. Click the Save and Continue button
Exercise 7 – Completing Organization & Locations

1. On the Organization and Location screen, the Applicant Organization tab will display first. The university's information will generate automatically.

2. The Performing Organization tab does not apply to UAH

3. If the work will be performed off campus, click Performance Site Locations
a. Click **Add Performance Site**

b. In the **Address Book Lookup** window **Search** and find **Integration Innovation, Inc. (i3)**

c. Place a check mark in the box and click **return selected**
d. Click the + Add Congressional District button

e. In the Add Line window select:
   i. **State:** Alabama
   ii. **District Number:** 7

f. Click the Add button

g. Click the Save button
4. If there are vendors and/or subrecipients on the proposal, their information will be entered under **Other Organizations**.

5. Click **Save and Continue**

**Exercise 8 – Adding Key Personnel, Updating Details & Certifying**

1. From the **Key Personnel** screen, select **Add Personnel**

2. Select **Employee** radio button

3. **Last Name:** <USE YOUR NAME>

4. Click the **Continue** button
5. In the search results window select the radio button for **YOUR NAME**
6. Click the **Continue** button

7. In the **Assign a role** window select the radio button for **PI/Contact**
8. Click the **Add Person** button

9. Click the arrow (►) next to the name of the PI/Contact
10. The **Details** tab will automatically populate

11. Select the **Person Training Details** tab to view completed training, then click **Save and Continue**

12. The PI, Co-I, and Key Personnel will complete the **Proposal Person Certification** for each proposal

13. Click **Save and Continue**

**Exercise 9 – Adding Special Review/ Compliance Information**

1. On the **Compliance** screen, click the **+ Add compliance entry** button
2. In the **Add Compliance Entry** window, enter the following:
   i.  **Type**: Human Subjects
   ii. **Approval Status**: Pending
3. Click the **Add Entry** button

4. Click the **Save and Continue** button
NOTE: Documents (i.e. the budget justification, Narrative, etc.) supporting the proposal should be uploaded under the Proposal tab.

1. On the Attachments screen, select Proposal tab, then click the + Add button

2. In the Details window, select the following:
   b. Type: select Narrative from the drop-down menu
   c. Status: Complete
   d. Description:
      e. Click the Choose File button and upload Narrative.pdf file

3. Click the Save button
4. On the **Attachments** screen, select **Personnel** tab, then click the **+ Add** button

5. In the **Details** window, select the following:
   - **f. Person**: select from the drop-down menu (YOUR NAME)
   - **g. Type**: Biosketch
   - **h. Description**: Technical Volume I
   - **i. File**: Click the **Choose File** button and upload Biosketch.pdf file

6. Click the **Save** button
Exercise 11 – Completing Questionnaire

Skip this section. This only applies to S2S submissions. Click Save and Continue.
Exercise 12 – Creating a Summary Budget

1. On the **Budgets** screen click the **+ Add Budget** button

![Screenshot of Budgets screen](image)

1. In the **Create a Budget Version** window enter the following:
   i. **Budget Name**: My Summary Budget
   ii. **Would you like to create a detailed budget or enter a summary only?**: Start a Summary Budget
   iii. **Will this be a modular budget?**: No

2. Click the **Create Budget** button

![Screenshot of Create a Budget Version](image)
3. Enter the following information for each budget period that displays.
   - Direct Costs: 10000
   - Indirect Costs: 4800
   - Cost Share: 1000

4. Click Save

5. On the Institutional Commitments screen, enter Source Account (600001) number(s) on the Cost Sharing screen

6. Click Save and Continue
7. On the **Budget Summary** screen, click **Complete Budget**

8. Place a check mark in the box and click **OK**

9. From the **Budget Summary** screen, click **Return to Proposal**
Exercise 13–Marking Budget Version as ‘Complete’ and ‘Final’

1. From the Budget screen, click the Action dropdown menu and select “Complete Budget”
OR

2. While in the Budget, click **Complete Budget**

3. Check the box for “Is this budget ready to be submitted to the sponsor?” and click **OK**
Exercise 14–Designating Access to Proposal

1. From the Access screen, click Add User

2. On the Add Permission screen, enter Personnel details and click Continue
3. Select the correct name and click **Continue**

4. Select the appropriate role and click **Add Permission**

5. Click **Save and Continue**

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**Exercise 15—Completing Supplemental Information**

2. Answer questions as they relate to the project
3. Click **Save and Continue**
1. On the Summary/Submit screen, Select Data Validation

2. In the Data Validation window, click the Turn On button

3. Review the displayed Errors/Warnings
4. Click the Fix It link for each of the Errors/Warnings
5. Correct the Errors as necessary. Proposals can be submitted with Warnings, but not Errors
6. On the **Summary/ Submit** screen, click **Submit for Review**

![Screenshot of the Summary/ Submit screen with the Submit for Review button highlighted.]

7. Select **Yes** for future approvals if you would like to receive notifications for all approvals.

![Screenshot showing the option to select Yes for future approvals.]

**Exercise 17—Searching for Proposals**

1. From the side menu, select **Common Tasks** tab and click **Search for Proposals**

![Screenshot of the Common Tasks tab with the Search for Proposals option highlighted.]
2. In the Development Proposal Lookup, enter the Proposal Number or perform a Search

3. Choose to View, Edit, or Copy proposal from search results. Medusa will allow the user to see how one proposal is related to any others.

Exercise 18–Recalling/ Returning a Proposal

1. On the Summary/ Submit screen click Return or Recall
2. Enter a reason in the box and click OK

Exercise 19–Approving the Proposal

1. From the Kuali Dashboard, click You're up!
2. Scroll to the bottom of the Summary/Submit page and click Approve

3. Add comment or upload an attachment if needed, this is optional. Click OK to approve

4. Approval is complete and the screen will return to the Summary/Submit page. Click Close to exit back to the Dashboard