Kuali Research

Kuali Research

Proposal Development Training Activities

Bowie State University
Summer 2026

Activity 1 – Logging In

Step No.	Instructions
1	Navigate to: https://bowiestate-sbx.kuali.co/ (This link is for training and practice purposes only)
2	Log in using Single Sign On (SSO) ***Note:*** *If you cannot access the Kuali system, please contact* ***kualiadmin@bowiestate.edu*** *with your issue.*

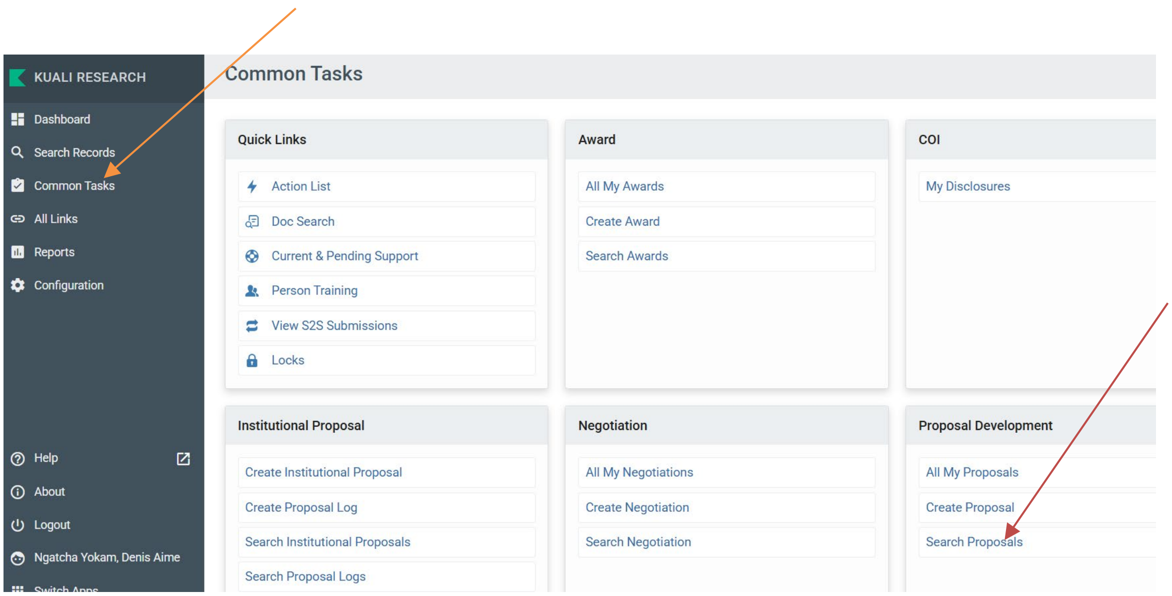
Activity 2 – Searching for Proposals (to be completed after creating at least one record in Kuali)

Step No. **Instructions**

From the Home screen:

1

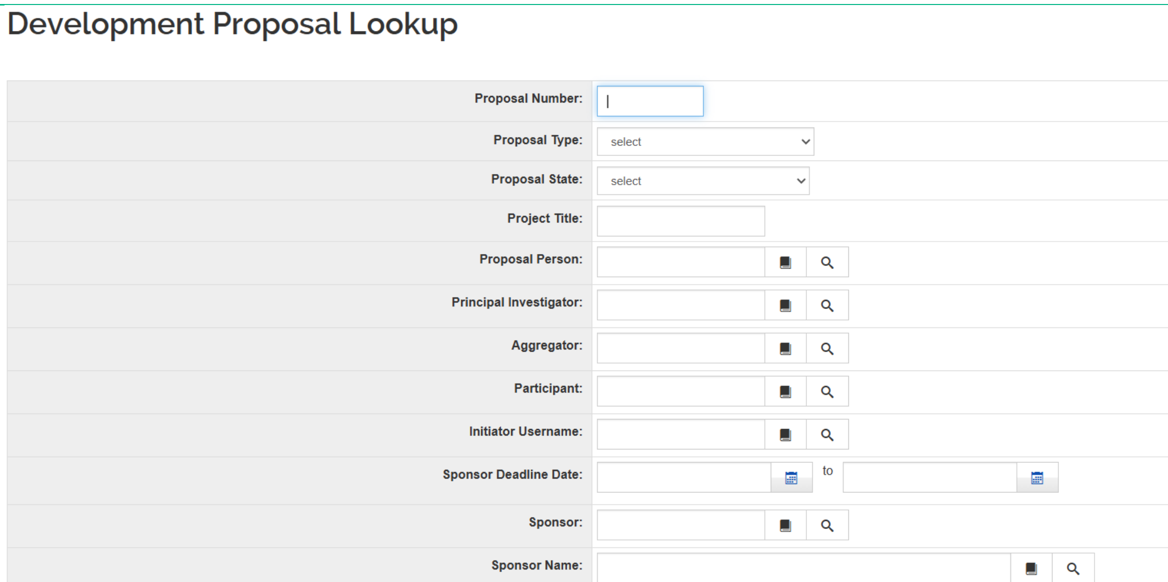
- Click the Common Tasks page and select Search Proposals



In the Development Proposal Lookup window select/enter:

2

- Proposal Type: New
- Proposal State: In Progress
- Click the search button

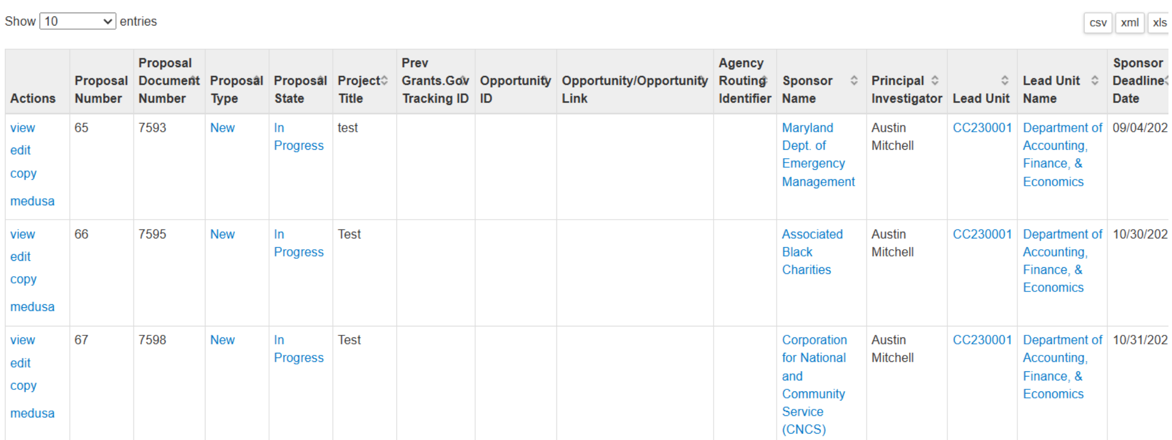


Development Proposal Lookup

Proposal Number:	
Proposal Type:	select
Proposal State:	select
Project Title:	
Proposal Person:	
Principal Investigator:	
Aggregator:	
Participant:	
Initiator Username:	
Sponsor Deadline Date:	to
Sponsor:	
Sponsor Name:	

In the displayed search results:

- Click the view link to open one of the proposals

3 

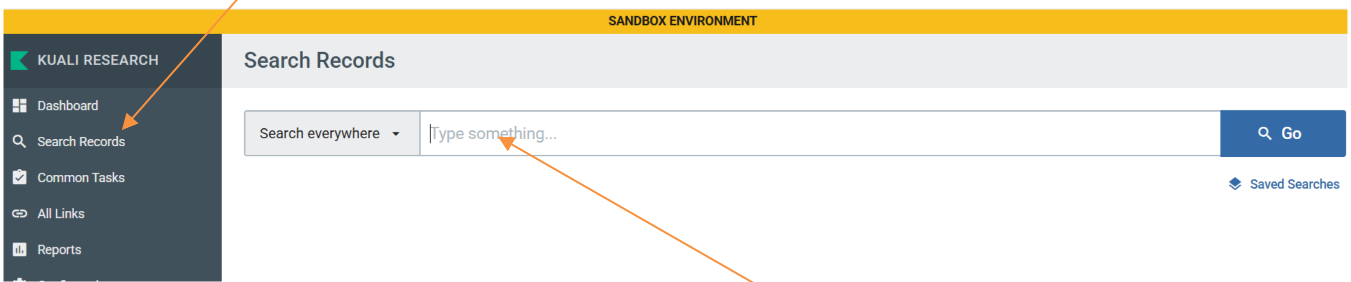
Show 10 entries

csv xml xls

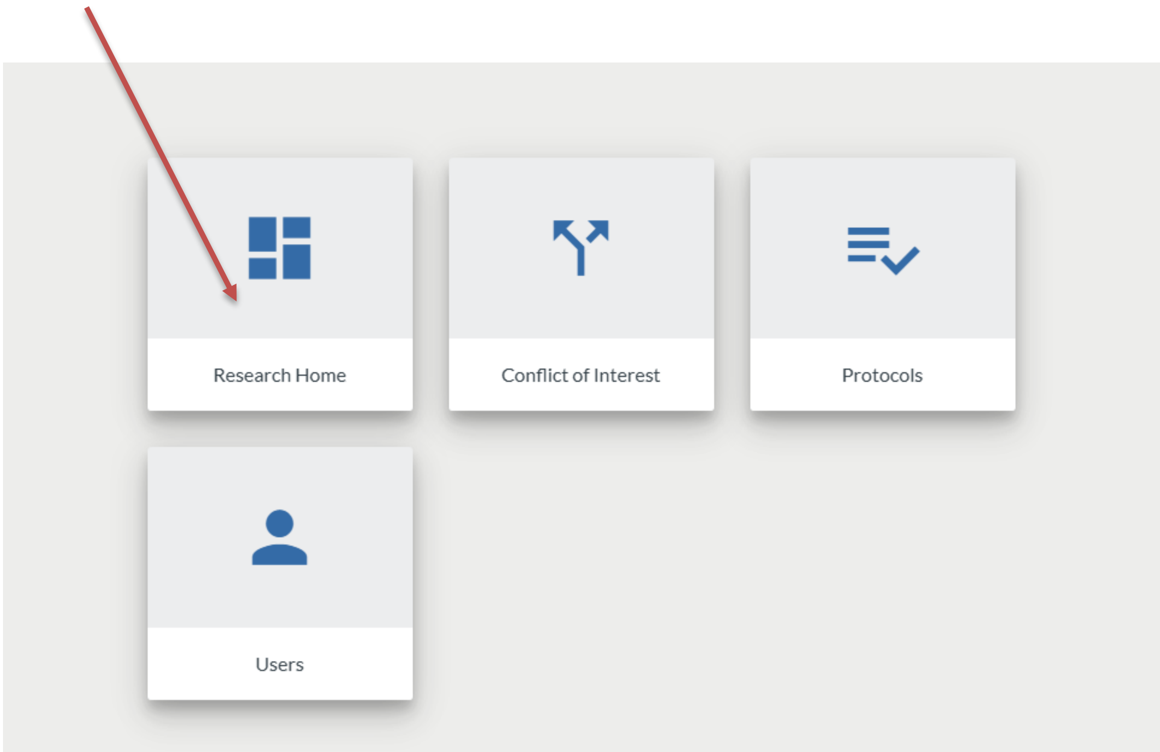
Actions	Proposal Number	Proposal Document Number	Proposal Type	Proposal State	Project Title	Prev Grants.Gov Tracking ID	Opportunity ID	Opportunity/Opportunity Link	Agency Routing Identifier	Sponsor Name	Principal Investigator	Lead Unit	Lead Unit Name	Sponsor Deadline Date
view edit copy medusa	65	7593	New	In Progress	test					Maryland Dept. of Emergency Management	Austin Mitchell	CC230001	Department of Accounting, Finance, & Economics	09/04/202
view edit copy medusa	66	7595	New	In Progress	Test					Associated Black Charities	Austin Mitchell	CC230001	Department of Accounting, Finance, & Economics	10/30/202
view edit copy medusa	67	7598	New	In Progress	Test					Corporation for National and Community Service (CNCS)	Austin Mitchell	CC230001	Department of Accounting, Finance, & Economics	10/31/202

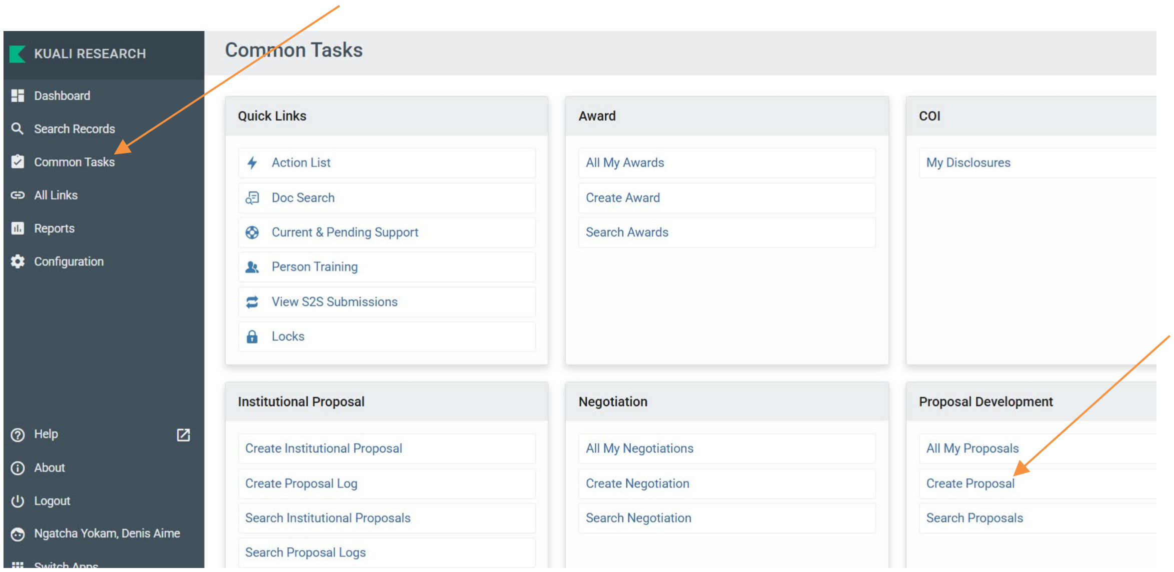
Note: If you know the proposal number, you can look it up by entering that number in the Proposal Number field and clicking on the search button.

A proposal can also be accessed from the Search Records tab by entering the PD number, the title, the PI name, or any other relevant keyword to the proposal.



Activity 3 - Initiating & Submitting a Proposal

Step No.	Instructions
1	From the Home screen: – Click Research Home  – Click the Common Tasks tab and click Create Proposal

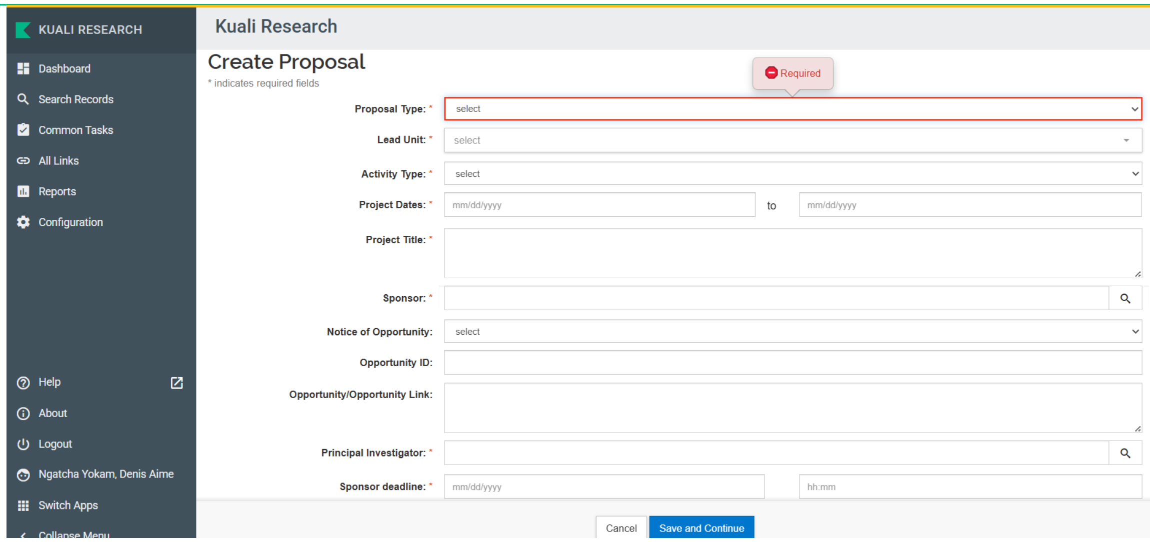


In the Create Proposal window (see on page 8), select/enter:

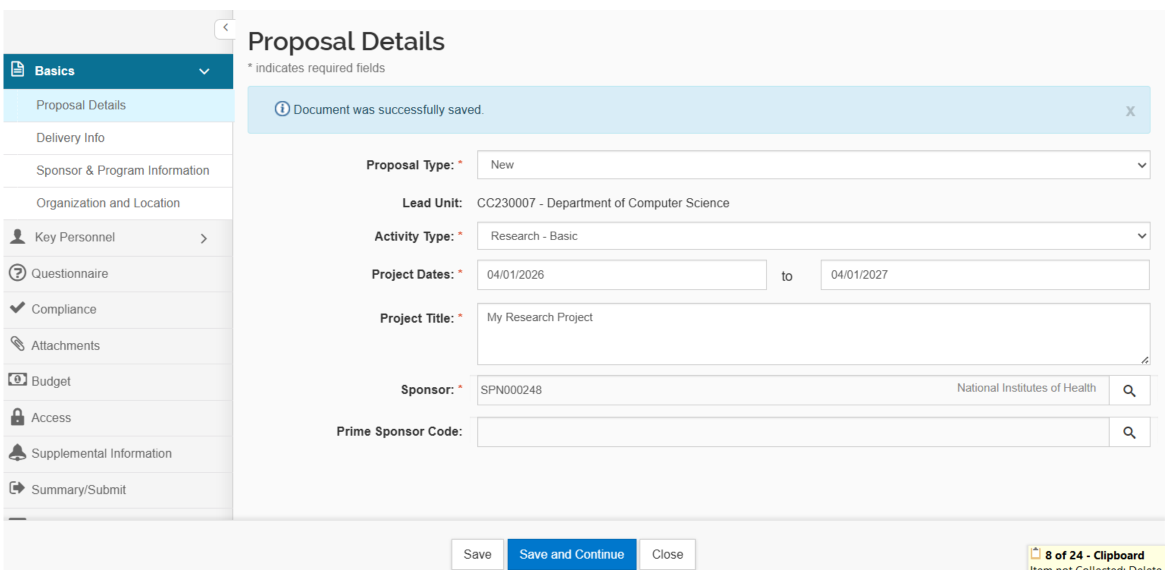
- Proposal Type: New
- Lead Unit: Select your Lead Unit (i.e. CC230007 - Department of Computer Science)
- Activity Type: Research - Basic
- Project Dates: 08/01/2026 (start date) and 07/31/2028 (end date)
- Project Title: My Research Project
- Sponsor: NIH (If new sponsor, select the sponsor “TBD”)

2 (Quick Tip: you can start typing the sponsor name in the sponsor field and the available options for selection will display)

- Notice of Opportunity: Federal Solicitation
- Opportunity ID: OPP-1234567
- Opportunity/Opportunity Link: https://exampleopportunity.gov
- Principal Investigator: Click on the Magnifying Glass Icon and search for Your Name
- Sponsor Deadline: 07/25/2026 (date) and 17:00 (time)
- Sponsor Deadline Type: Receipt (see glossary for more details on deadline types)
- Anticipated Award Type: Grant
- Click the Save and Continue button



The Proposal will open with the display defaulted to the Proposal Details screen.



3

❖ Conflict of Interest (COI) Disclosure Requirement

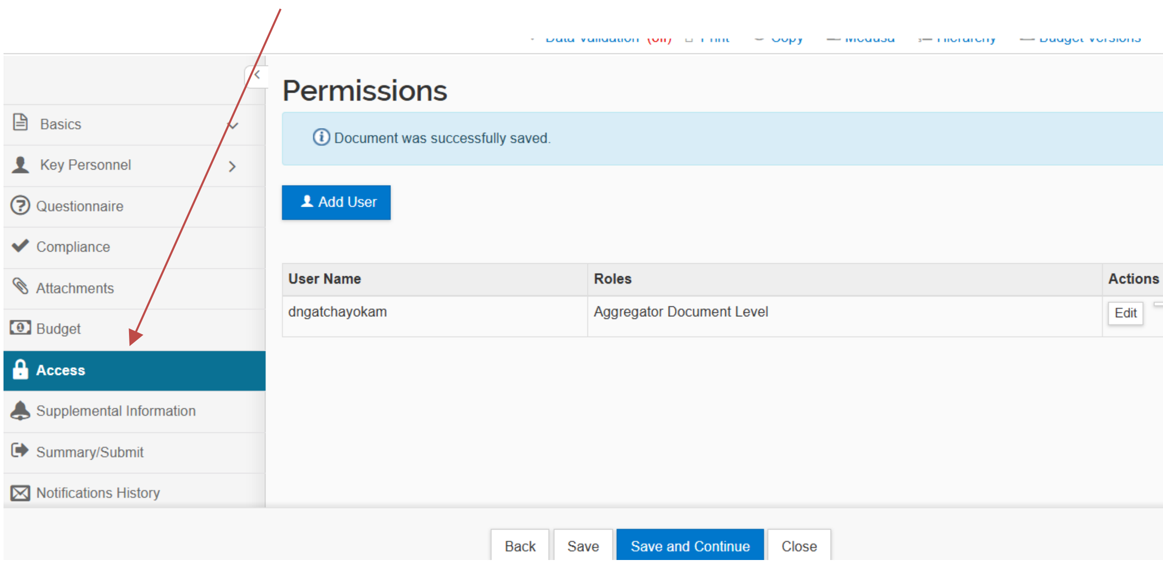
After saving the proposal, the Principal Investigator (PI) will automatically receive an email notification prompting them to complete a Conflict of Interest (COI) disclosure in Kuali.

- Email Subject Line: "Action Required: Create COI disclosure due to a new project"
- The PI must follow the instructions in the email to access and complete the required disclosure in Kuali.

Note: A separate training session will be provided at a later date with step-by-step instructions on how to complete a COI disclosure in Kuali.

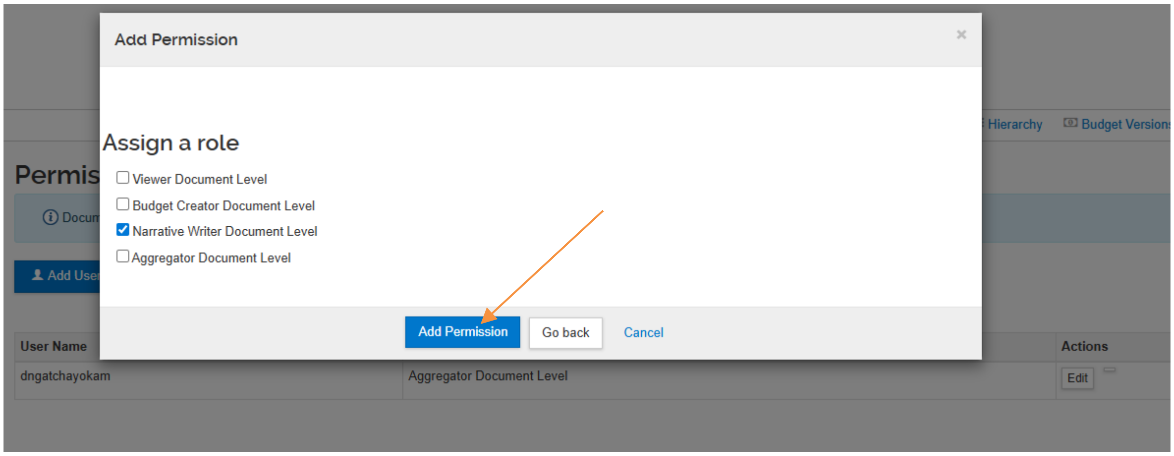
3.1 – Assigning Proposal Roles

Step No.	Instructions
1	While in the Proposal, click the Access panel



Step No.	Instructions
2	In the Permission screen: – Click the Add User button – In the Add Permission window, search for and return Shalini S Singh – Assign a role: Narrative Writer Document Level

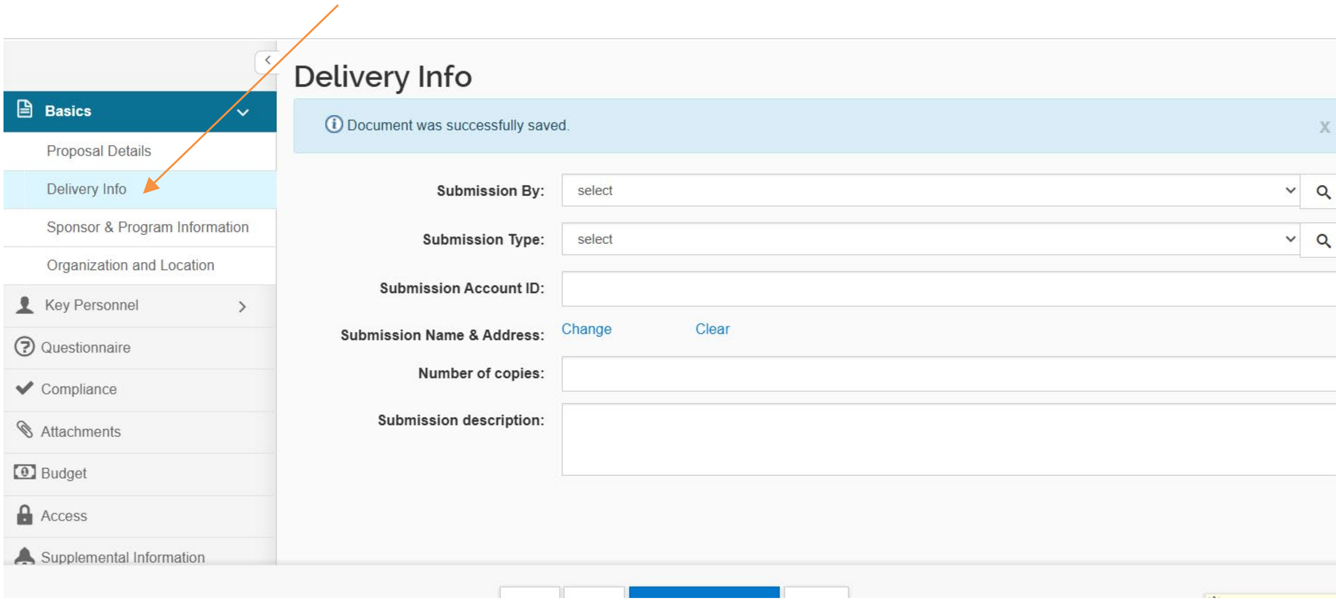
- Click the Add Permission button



3 Click the Save button at the bottom of the Permissions screen.

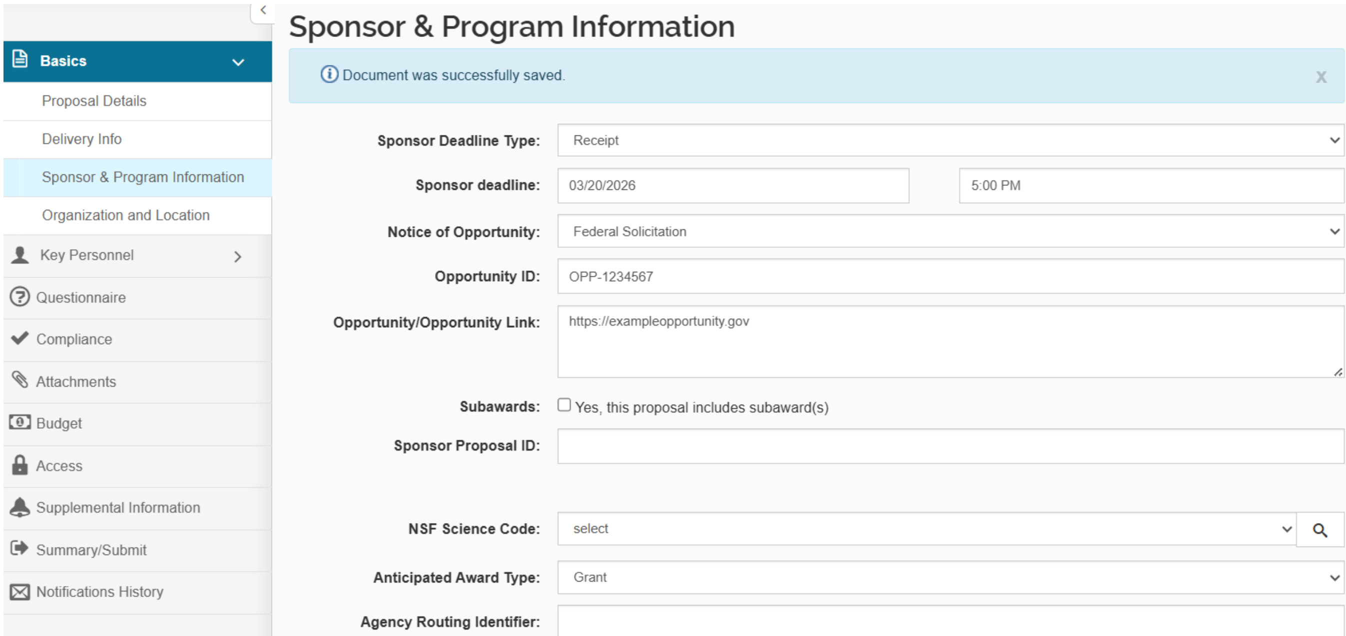
3.2 – Completing Delivery/Proposal Submission Info

Step No.	Instructions
	In the Delivery Info screen (under Basics):
1	– Submission By: ORSP – Submission Type: Electronic – Submission description: Enter Please submit through ASSIST – Click the Save and Continue button



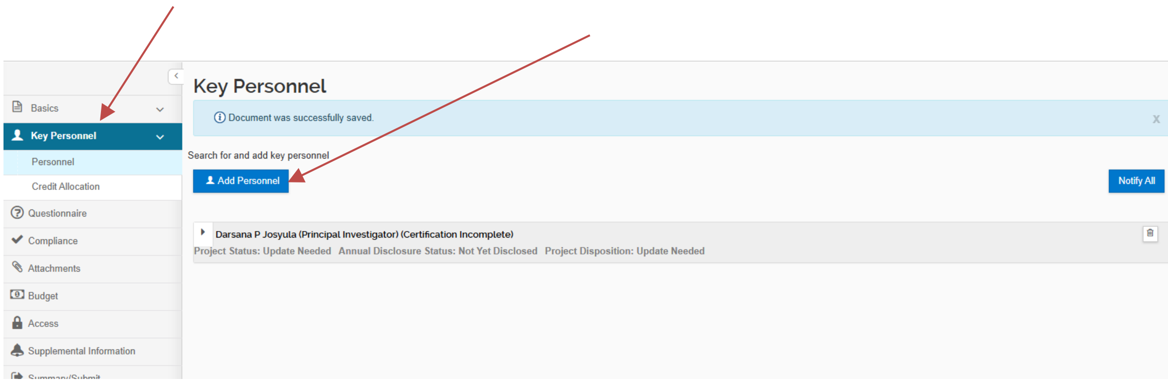
3.3 – Completing Sponsor & Program Information

Step No.	Instructions
1	In the Sponsor & Program Information screen select/enter: – NSF Science Code: Computer and Information Sciences: A.01 – Click the Save and Continue button

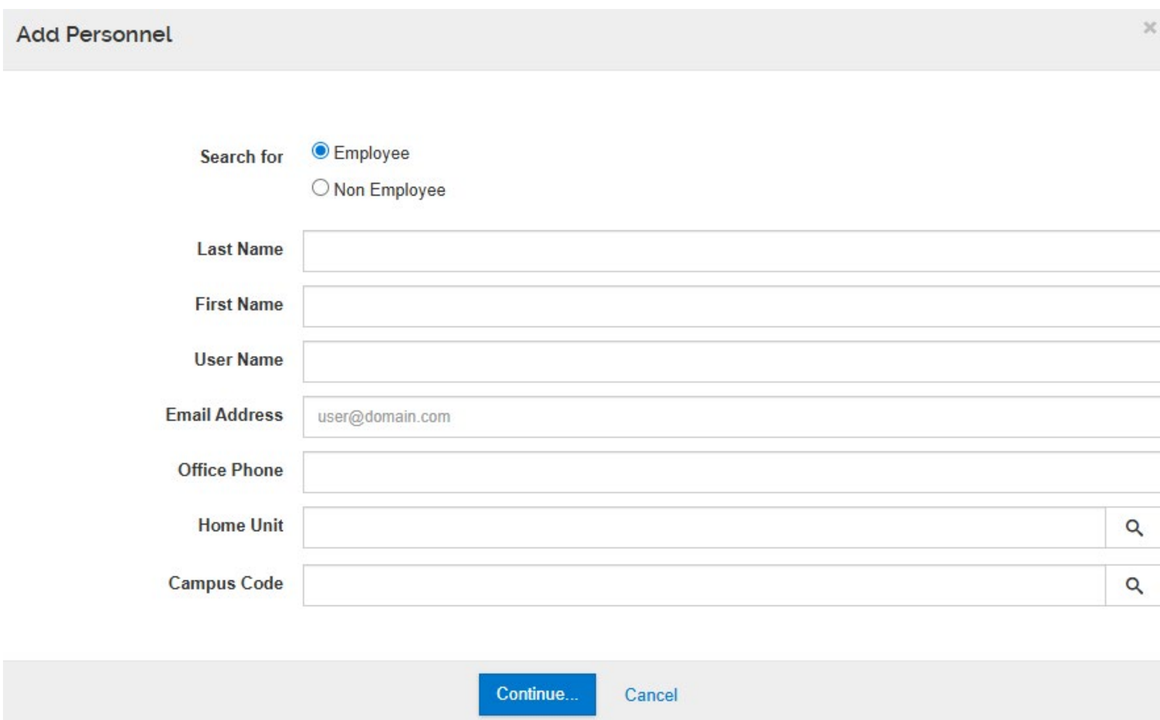


3.4 – Adding Key Personnel, Updating Details & Certifying

Step No.	Instructions
1	While in the Proposal, select Key Personnel → Personnel subpanel

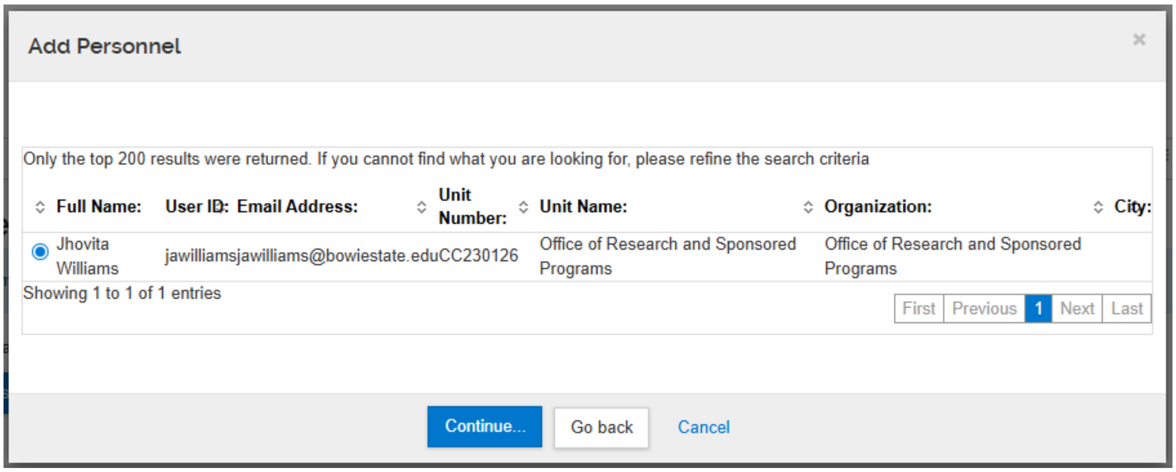


- Click the Add Personnel button
  - In the Add Personnel window:
    - Select Employee radio button
    - First Name: Jhovita
    - Click the Continue button

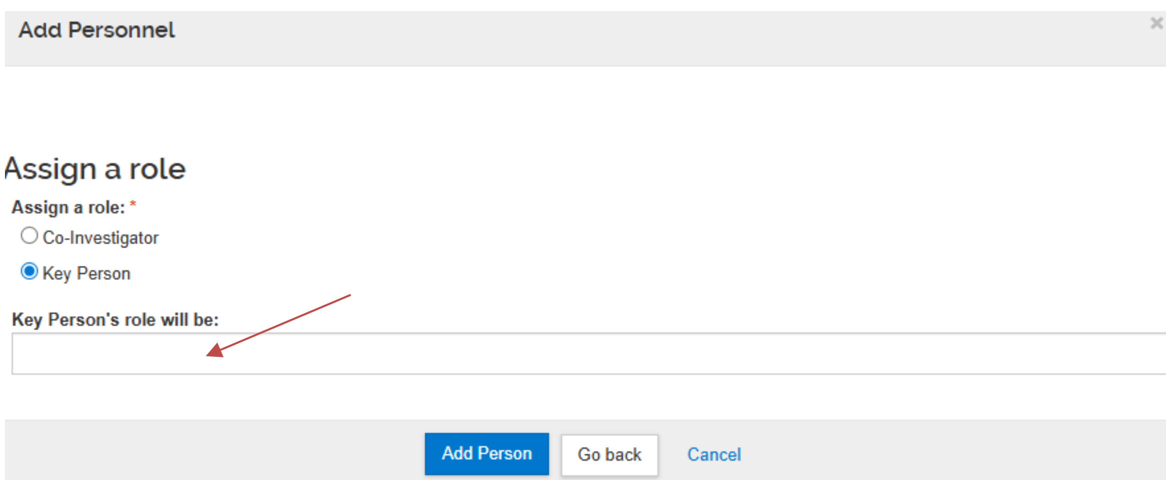


2

- In the Search Results window:
  - Select the radio button for Jhovita Williams
  - Click the Continue button



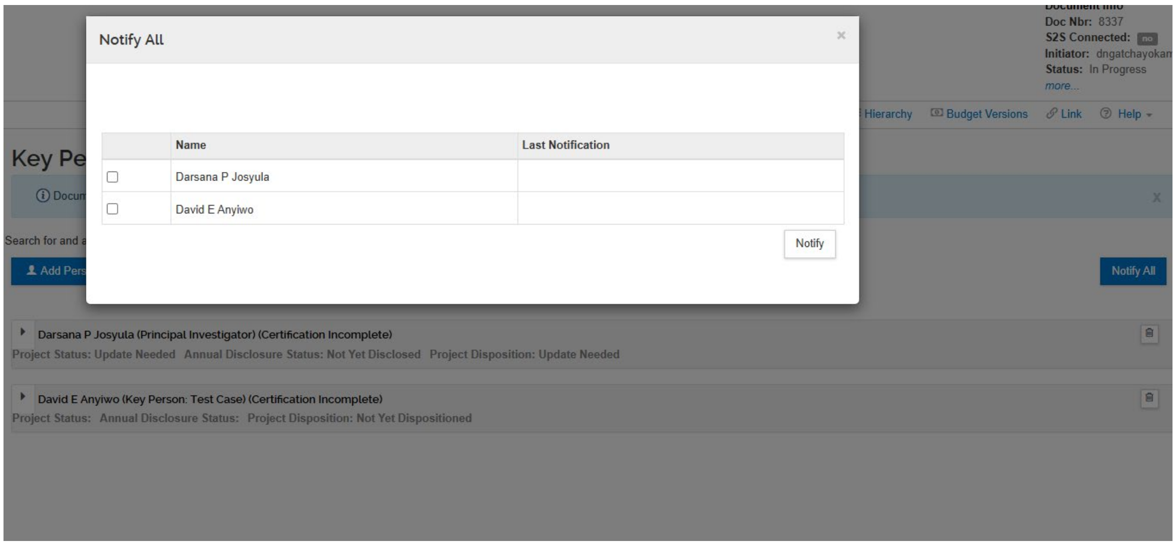
- In the Assign a role window:
  - Select the radio button for Key Person
  - In the Key Person's role field, enter Subaward PI
  - Click the Add Person button



– Click the Save button

3 On Key Personnel → Personnel subpanel

– Click Notify All to notify all key personnel to answer certification questions. Certification questions must be answered before a proposal can be submitted into workflow



4 Click the Save and Continue button

3.5 – Certifying Key Personnel

Once you have been added to a proposal as an Investigator or Key Person, proposal Aggregators can send you email notifications and reminders requesting that you complete your certification. (You will also be required to complete a COI disclosure).

There are three methods available to certify:

- Email
- Dashboard Card
- Action List

Note: At this time, we will use Email and Dashboard Card methods only.

1. Email Certification Method

Receiving the Certification Request

- Proposal Aggregators add you as an Investigator or Key Person and select Notify.

- You will receive an email with the subject line:
  "Regarding your involvement in Development Proposal: [Proposal Title]"

  See sample email below:

  Regarding your involvement in Development Proposal Research and administration Capacity development ... Summarize

  from.address=kuali.org@mx3.kuali.co on behalf of from.address@kuali.org
  To: Kuali Implementation

  Reply | Reply all | Forward

  CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

  TEST MODE
  In Production mode this mail will be sent to the following...
  TO: [jawilliams@bowiestate.edu]

  Please review the following proposal by clicking on Proposal Number. Please answer the certification questions if you agree to participate in this project. Proposal Details as follows:
  Document Number: 8333
  Proposal Number: 96
  Proposal Title: Research and administration Capacity development ...
  Principal Investigator: Rafel Rosier
  Lead Unit: CC230126 - Office of Research and Sponsored Programs
  Sponsor: SPN000253 - National Science Foundation
  Deadline Date: 03/02/2026

- When you are ready to certify, click the proposal number link in the email.

Important: You must be logged into Kuali Research to access the certification page.

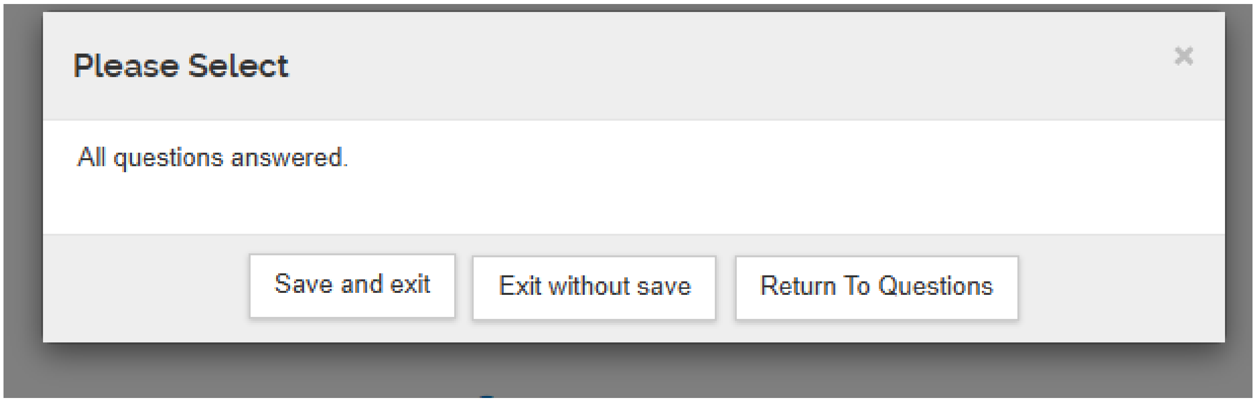
Completing the Certification

- You may proceed directly to answering the certification questions; however, it is best practice to review the proposal first.
- If you navigate away or get lost, simply return to the email and click the proposal link again to return to the certification page.
- Answer all certification questions, then click Certify Answers.

After Clicking "Certify Answers", if all questions are answered:

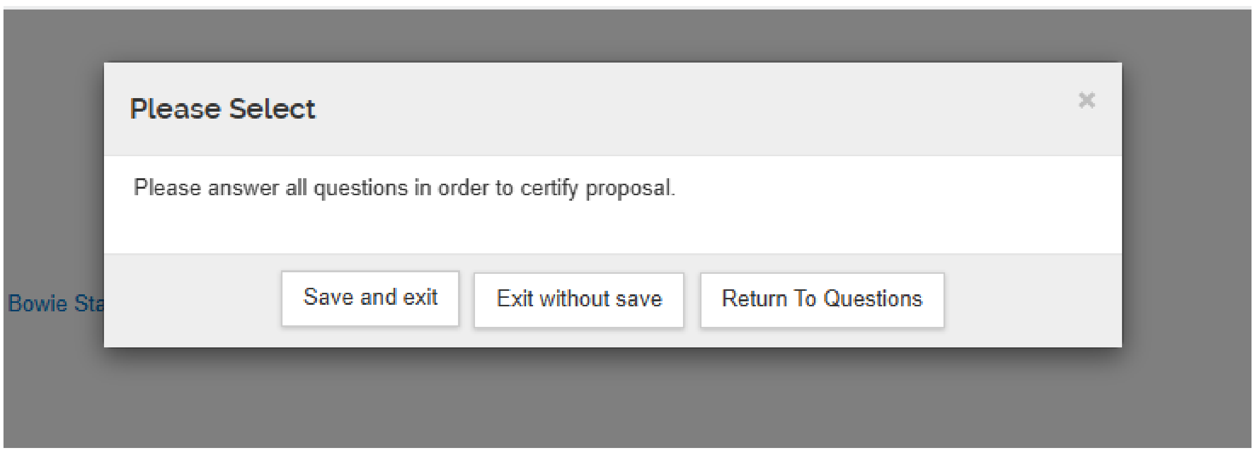
You will see the message "All questions answered" and be given three options:

- Save and Exit – Saves your responses and exits the questionnaire.
- Exit without Save – Exits without saving any responses.
- Return to Questions – Returns you to the questionnaire to review answers.



If not all questions are answered:

You will see the message "Please answer all questions in order to certify proposal."



You must return to the questionnaire and complete all required questions before certification can be finalized.

Printing Certification Responses

- You may print the certification questions and your responses for your records, if desired.

Reviewing or Updating Your Certification Answers

- Click the proposal link in the original email to view your previously submitted answers.
- If you update any responses, you must click "Certify Answers" again, then select Save and Exit to ensure your changes are recorded.

2. Dashboard Card Certification Method

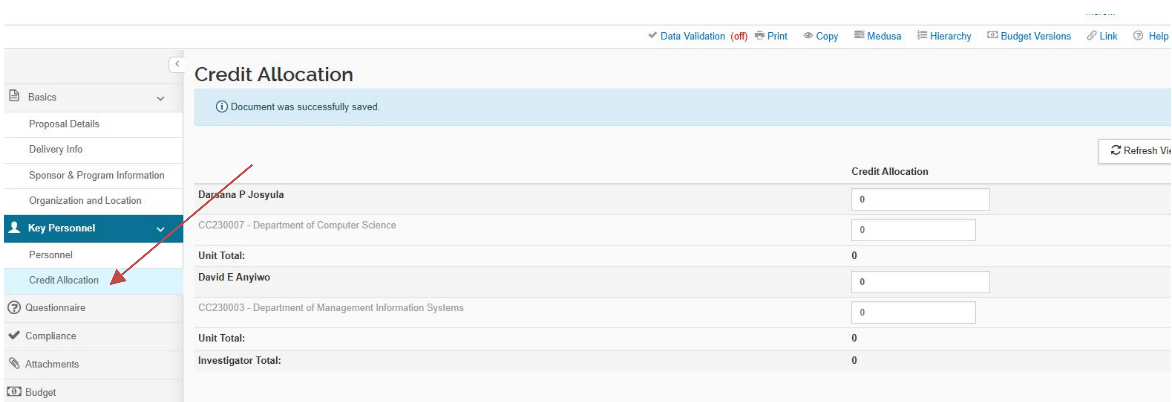
- When you are included in a proposal that requires certification, it will appear on your Dashboard under Proposals Not Routing.
- Click the proposal link from your dashboard to access the certification page.
- While in the Proposal, select Key Personnel → Personnel subpanel

In the Key Personnel screen:

- Click the ► next to the name of the personnel (your name)
- Click the Certification tab
  - Answer the Certification questions
- Click the Save button

3.6 – Credit split

Step No.	Instructions
1	Under the Key Personnel panel, click on Credit Allocation.



Here, you want to provide credit to investigators for their contributions towards proposed research and/or projects. Credit splits are determined by the lead PI and should be discussed by all investigators at the proposal stage and agreed upon jointly. Credit allocation indicates work done by the investigators and their respective units, split by percentage to each. These amounts are used to distribute indirect cost funds.

The current IDC recovery is as follows:

65% - University
12% - Research Fund
6% - Dean
6% - Chair
11% - PI

Assigning Credit Allocation

The Proposal Aggregator needs to assign credit to one or more persons and units for a project. Assigning Credit Allocation is required in Kuali before submitting a proposal.

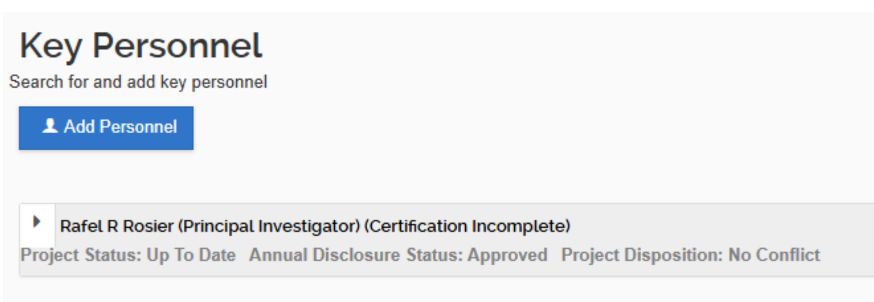
Allocation is designated to one or multiple persons and within one unit or across multiple units. The personnel and unit total credits must both equal 100% in all categories.

By default, all named persons on a project will be listed on the Credit Allocation Screen. You may remove some names from the list as needed.

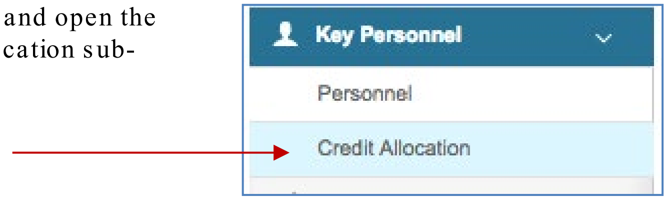
To assign a Credit Allocation, do the following:

<u>EXAMPLE 1 – Only 1 PI on the project</u>

1. Assign Personnel to your proposal:



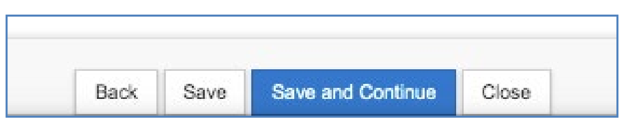
2. Navigate to the Proposal Key Personnel and open the Panel to show Personnel and Credit Allocation sub-panels. Click on Credit Allocation.



Here is what the Credit Allocation panel looks like before entering credit:

3. In the Credit Allocation Screen, insert the percent credit for each person and unit. The total credit for the project must be 100% in all columns. In the example below, the PI is the only person working on this proposal. He and his unit will receive 100% credit for this proposal.

4. At the bottom of the screen, click Save Button



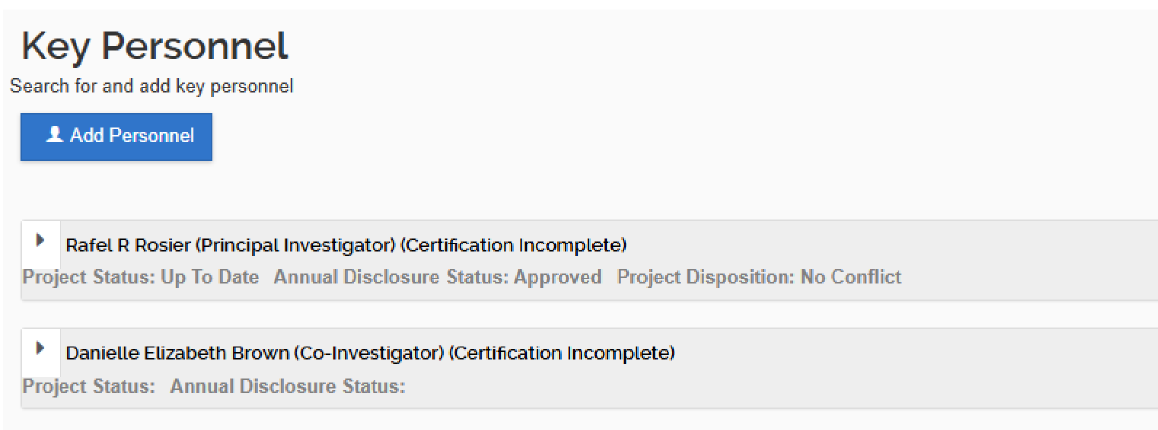
The Unit and Investigator totals equal 100%

In this scenario, the total indirect cost request is $100,000 and if the project is awarded, the indirect costs recovery will be distributed as follows:

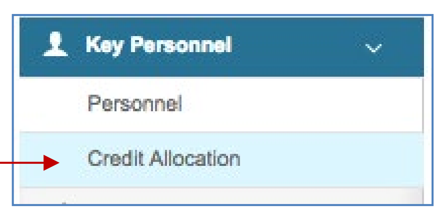
PI: $100,000 * 11% = $11,000
Chair/Supervisor: $100,000 * 6% = $6,000
Dean/VP: $100,000 * 6% = $6,000

<u>Example 2 – Multiple PIs on the project</u>

1. Assign Personnel to your proposal:



2. Navigate to the Proposal Key Personnel and open the Panel to show Personnel and Credit Allocation sub-panels. Click on Credit Allocation.



Here is what the Credit Allocation panel looks like before entering credit:

Credit Allocation

	Credit Allocation
Rafel R Rosier	0
CC230126 - Office of Research and Sponsored Programs	0
Unit Total:	**0**
Danielle Elizabeth Brown	0
CC230011 - Department of Fine and Performing Arts	0
Unit Total:	**0**
Investigator Total:	**0**

3. In the Credit Allocation Screen, insert the percent credit for each person and unit. The total credit for the project must be 100% in all columns. The lead PI has discussed with the Co-PI and agreed to a 75/25 credit split.

Credit Allocation

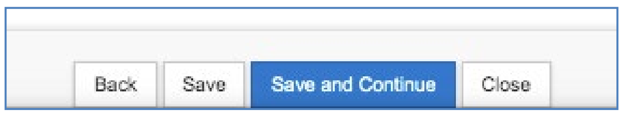
	Credit Allocation
Rafel R Rosier	75
CC230126 - Office of Research and Sponsored Programs	0
Unit Total:	**0**
Danielle Elizabeth Brown	25
CC230011 - Department of Fine and Performing Arts	0
Unit Total:	**0**
Investigator Total:	**0**

4. Since each person is assigned to a single unit, the unit total for each person should be 100%. This is stating that 100% of the assigned credit allocation goes to the unit listed.

Credit Allocation

	Credit Allocation
Rafel R Rosier	75
CC230126 - Office of Research and Sponsored Programs	100
Unit Total:	0
Danielle Elizabeth Brown	25
CC230011 - Department of Fine and Performing Arts	100
Unit Total:	0
Investigator Total:	0

5. At the bottom of the screen, click Save Button



The Unit and Investigator totals equal 100%

Credit Allocation

	Credit Allocation
Rafel R Rosier	75
CC230126 - Office of Research and Sponsored Programs	100
Unit Total:	100
Danielle Elizabeth Brown	25
CC230011 - Department of Fine and Performing Arts	100
Unit Total:	100
Investigator Total:	100

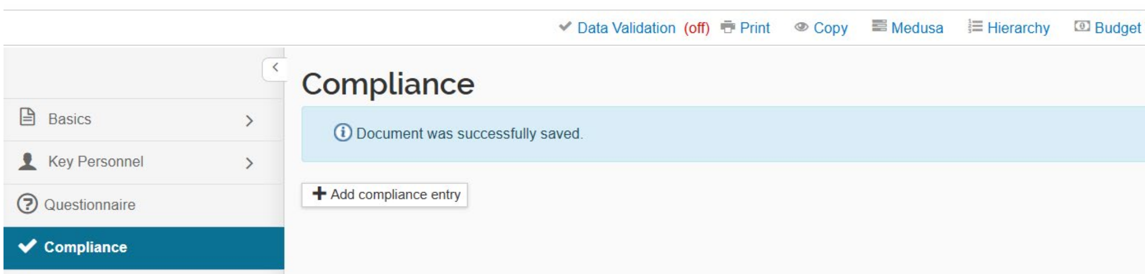
In this scenario, the total indirect cost request is $100,000 and if the project is awarded, the indirect costs recovery will be distributed as follows:

Lead PI: $100,000 * 11% * 75% = $8,2500
Co-PI: $100,000 * 11% * 25% = $2,750

Lead PI's Chair/Supervisor: $100,000 * 6% * 75% = $4,500
Co-PI's Chair/Supervisor: $100,000 * 6% * 25% = $1,500

Lead PI's Dean/VP: $100,000 * 6% * 75% = $4,500
Co-PI's Dean/VP: $100,000 * 6% * 25% = $1,500

3.7 – Adding Special Review / Compliance Information

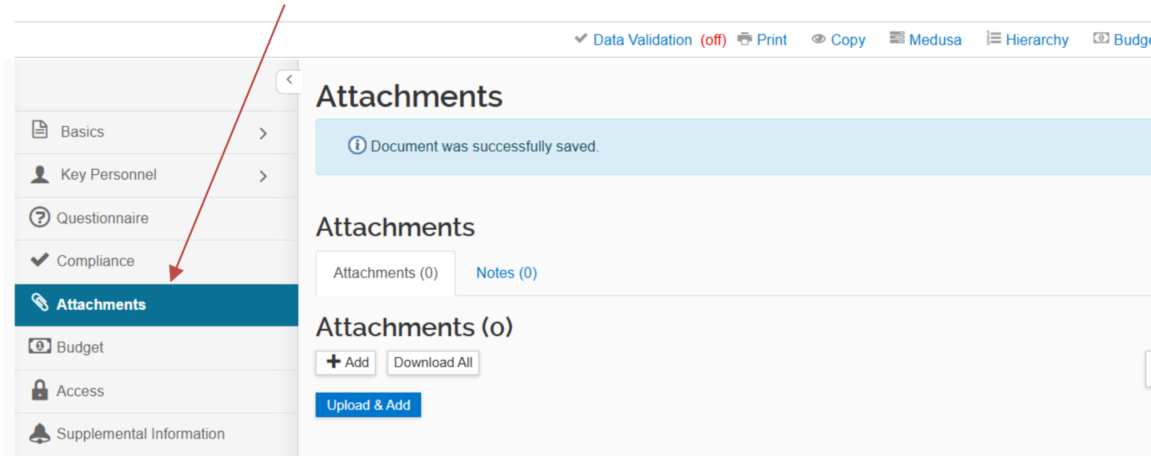
Step No.	Instructions
	In the Compliance screen:
1	

- 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

3.8 – Adding Attachments

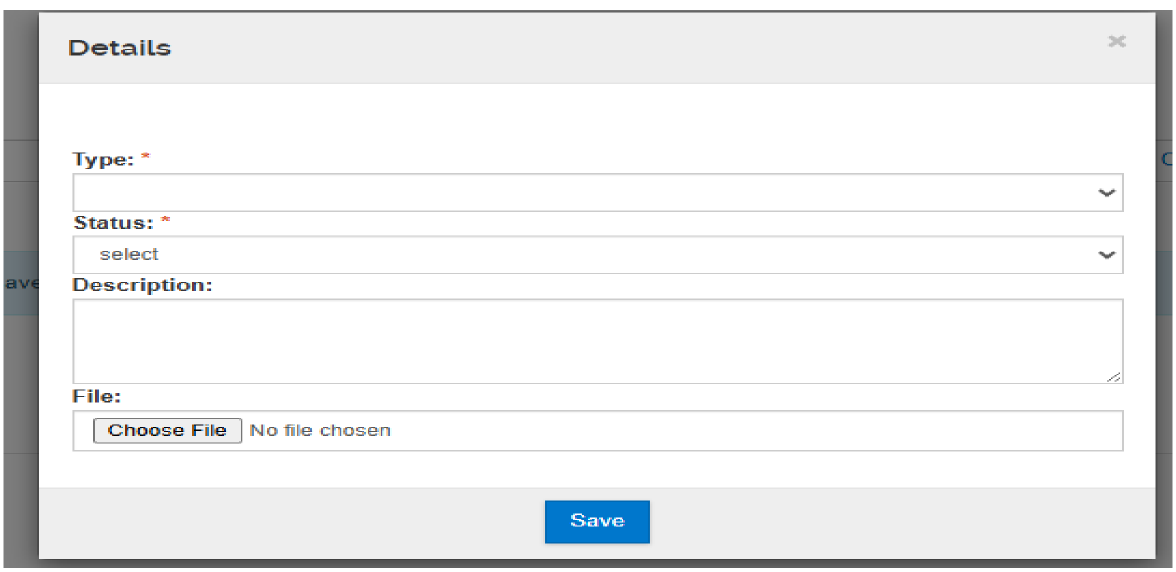
Step No.	Instructions
1	

While in the Proposal, click the Attachments panel



In the Attachments screen ->Attachments tab:

- Click the + Add button
  - In the Details window:



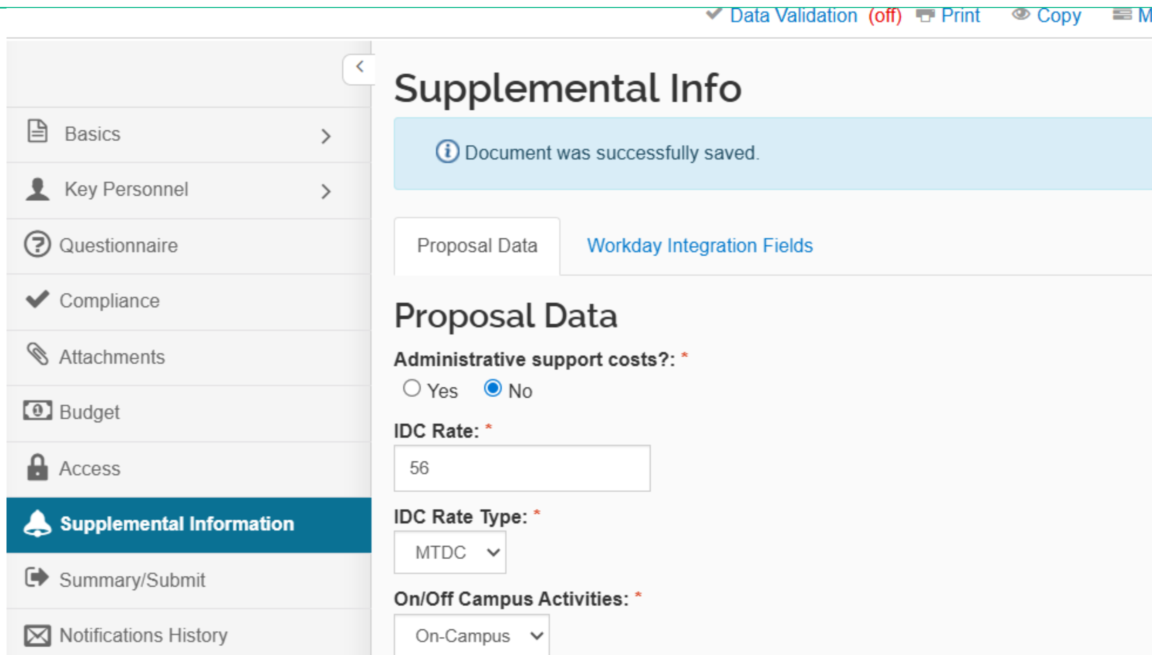
2

- Type: Proposal Narrative
- Status: Complete
- Description: Enter Project Narrative
- Click the Choose File button and upload a file from your computer.
- Click the Save button

- Click the + Add button
    - In the Details window:
        - Type: Budget Justification
        - Status: Complete
        - Description: Enter Budget Justification
        - Click the Choose File button and upload a file from your computer.
        - Click the Save button

3.9 – Completing Supplemental Information

Step No.	Instructions
1	Click the Supplemental Information panel – In the Supplemental Info screen then select/enter:



- Proposal Data Tab
  - Administrative Support costs?: No
  - IDC Rate: Enter 56%
  - IDC Rate Type: MTDC
  - On/Off Campus Activities: On-Campus
  - NIH/AHRQ Activity Code (e.g. R01, R03, R21): Enter R03
- Workday Integration Fields
  - Workday Nacubo Function Code: NF0101 General Instruction

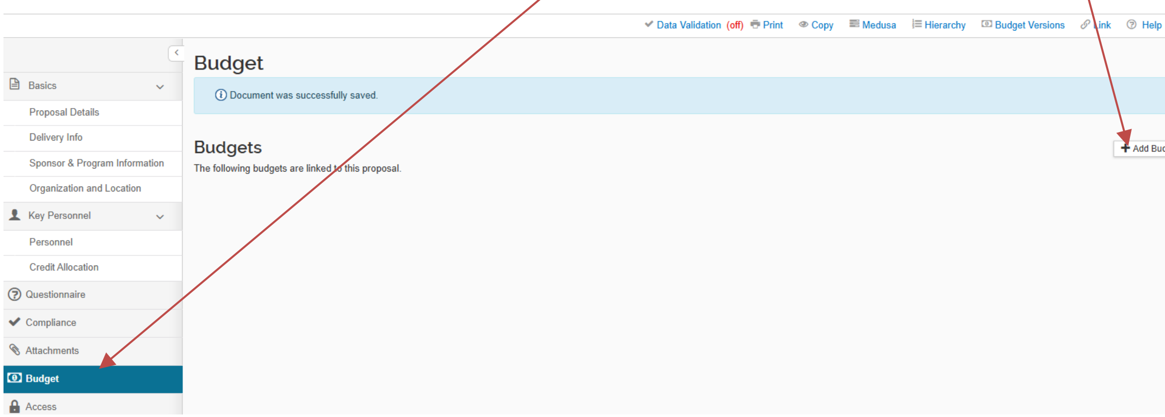
– Click the Save button

3.10 – Completing a Summary Budget

Step No.	Instructions

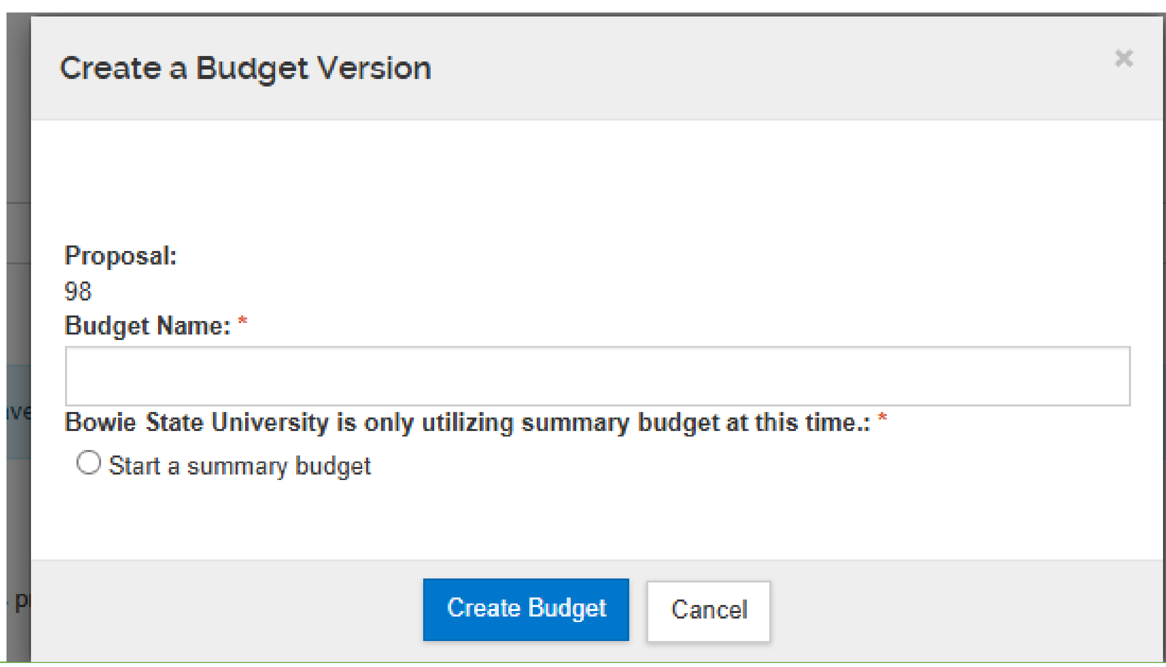
While in the Proposal → Budget panel:

- Click the + Add Budget button



1

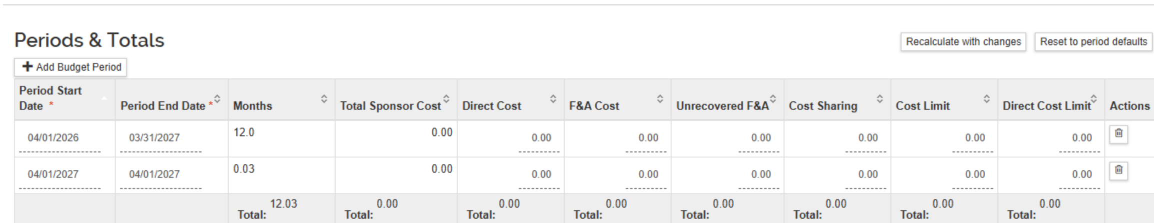
- o In the Create a Budget Version window select/enter:



- Budget Name: Enter Other Budget Features
- Check Start a summary budget
- Click the Create Budget button

– Navigate to the Periods & Totals screen and enter values for the Direct Cost, Indirect Cost, and Cost Share in each period.

2



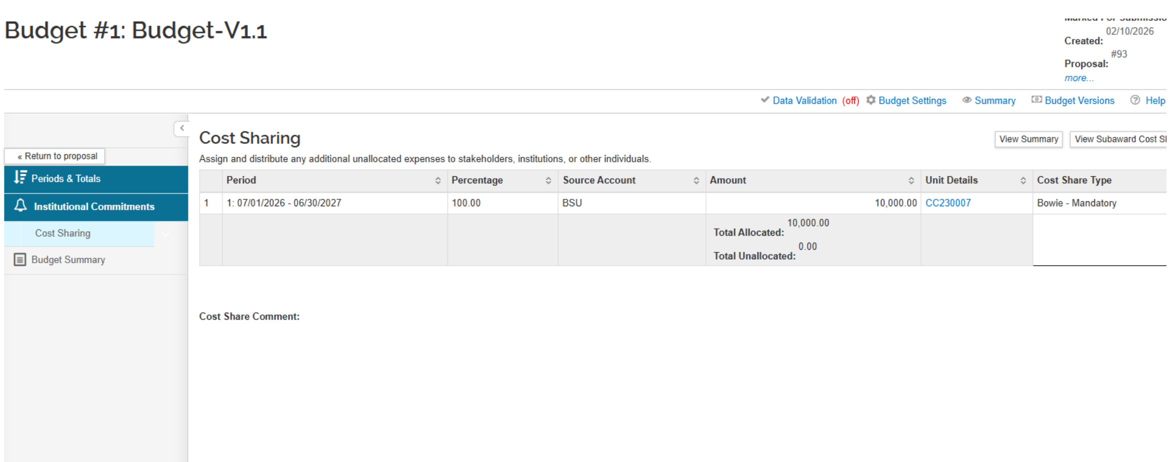
Click the Save button and confirm that the Total Sponsor Cost column calculates correctly

---

3.11 – Distributing Cost Sharing

Step No.	Instructions
	While in the Budget, click the Institutional Commitments panel -> Cost Sharing subpanel

1



2	In the Cost Sharing screen: – In all lines enter: o Source Account: BSU o Unit Details: Select the Unit providing cost sharing
3	Click the Save button.

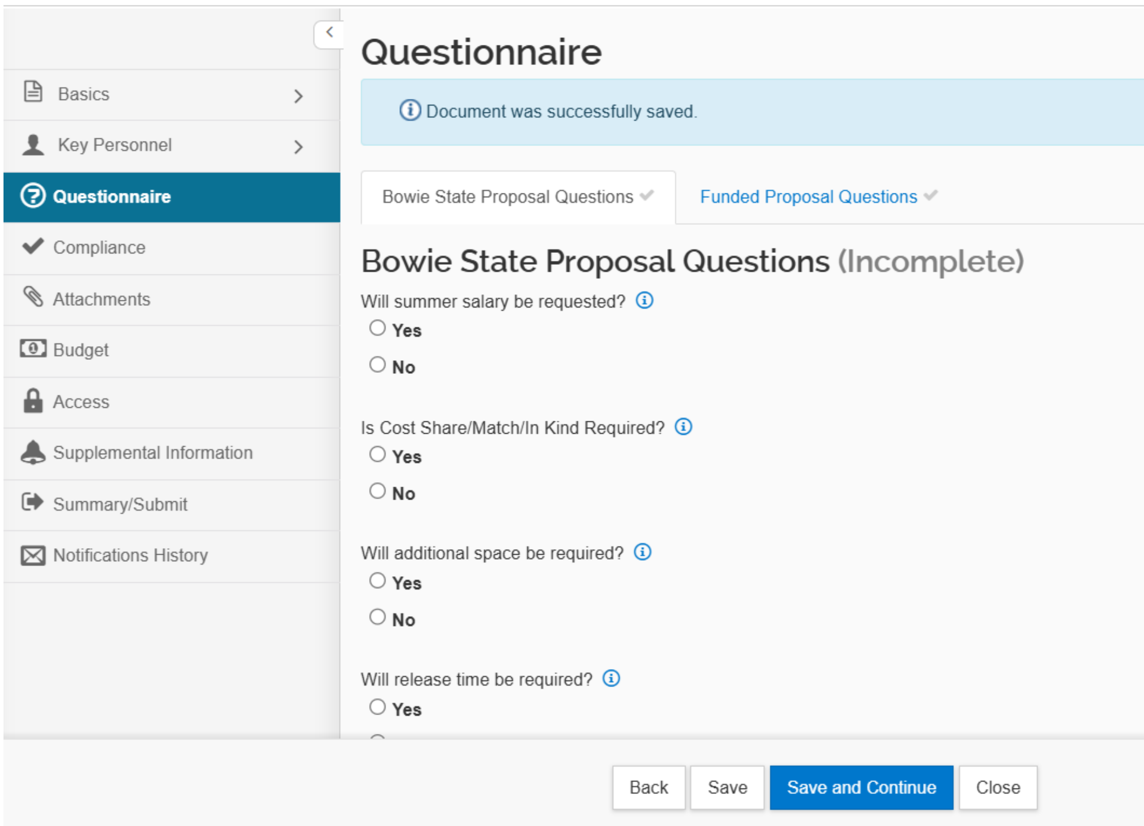
3.12 – Marking Budget Version as 'Complete' and 'Final'

Step No.	Instructions
1	While in the Budget, click the Return to proposal button
2	In the Budgets section for budget version 1: – Click the Action button and select Complete Budget – Click Ok to confirm – Click the Action button again and select Include for Submission
3	Click the Save button.

3.13 – Answer the Questionnaires

Step No.	Instructions
1	

Click the Questionnaire panel -> Bowie State Proposal Questions

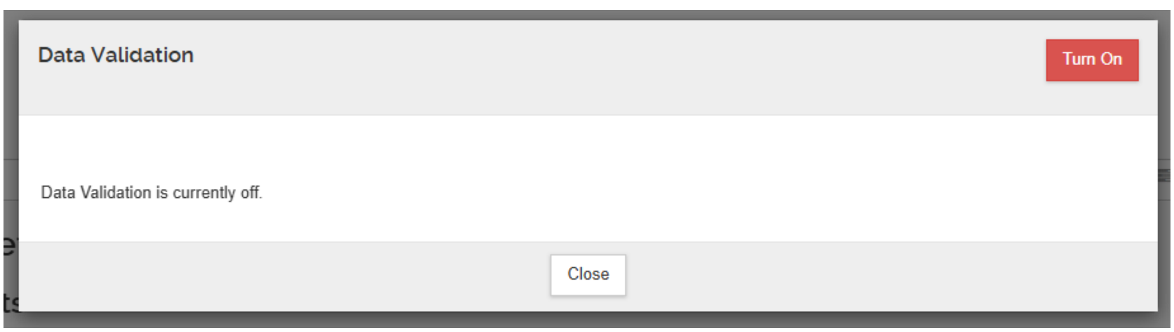


- Complete the questionnaire presented

2 Do the same for the Funded Proposal Questions

3 Click the Save button.

3.14 – Validating Proposal

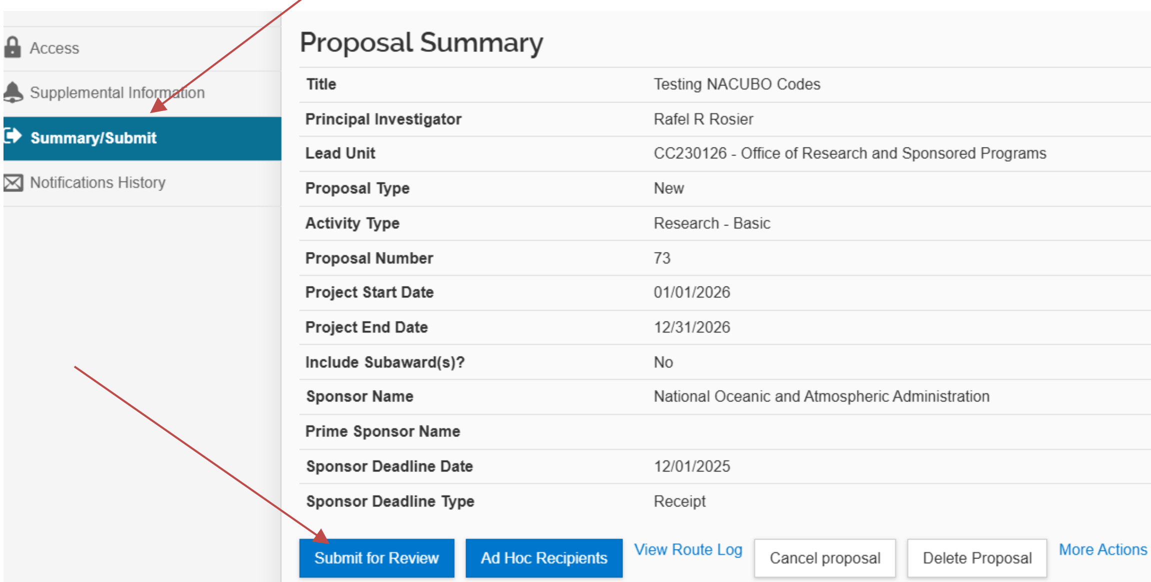
Step No.	Instructions
1	Back in the Proposal screen, click the Data Validation link
2	In the Data Validation window: – Click the Turn On button 
3	Review the displayed errors/warnings
4	Click the Fix It link to correct the error(s)/warning(s)

3.15 – Submit Proposal For Review

Step No. Instructions

1

Back in the Proposal screen, navigate to Summary/Submit



2

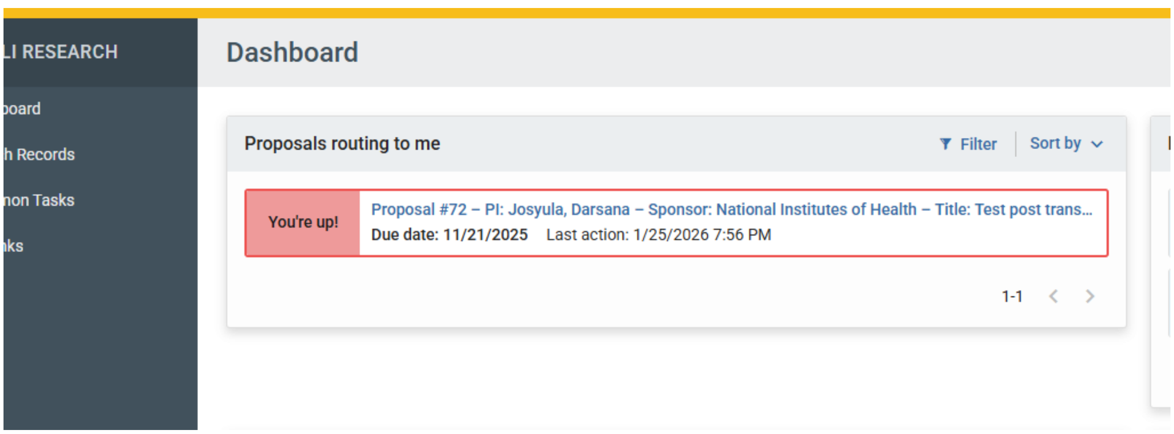
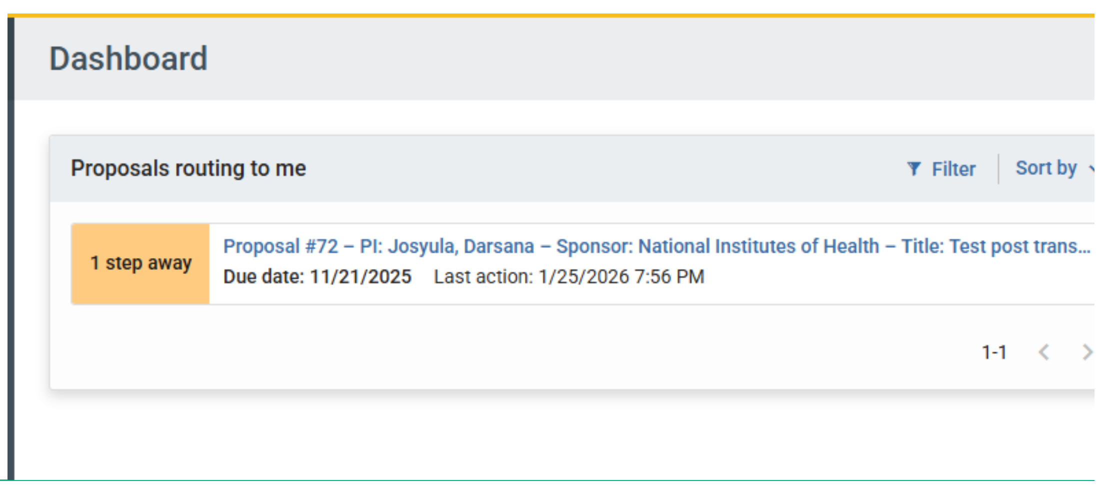
- Click the Submit for Review button

3

Click the View Route Log link to review and confirm the approval steps that will be required to complete approval of the proposal.

** See [Proposal Coversheet - Process Flow.pdf] **

Activity 4 – Approve or Return a Proposal

Step No.	Instructions
1	When a proposal is routed for you to approve, a notification is sent to you by email with the subject line “Kuali Research Action - Proposal - APPROVE - PI: [PI Name] - Due Date: …“
2	Navigate to The Kuali dashboard to find the proposal in the Proposals routing to me dashboard card, or click on the Document # link in the email received to review the requested action.  
3	Review the proposals details on the Summary/Submit page

4	If the proposal is acceptable press the Approve button and add an approval comment and an approval attachment if necessary. If the proposal requires changes from the Researcher, press the Return button and enter the reason you are returning the proposal.
5	Click the View Route Log link and confirm that the action you've taken is properly recorded and the proposal is now waiting on the next appropriate approver, or has been returned to the Aggregator.

Activity 5 – Accessing Proposal Returned for Corrections

Step No.	Instructions
1	From the Kuali Home screen: – Click the Common Tasks tab and selected Search Proposals (Quick Tip: you can also search for proposals from the Search Records tab)
2	In the Development Proposal Lookup window select/enter: – Proposal Type: New – Project Title: *My Important Project* – Proposal State: Revisions Requested – Click the search button
3	In the displayed search results: – Click the view link to open the proposal in question
4	Navigate to the Summary/Submit screen and click the View Route Log link

Find the revision comments included in the Annotation field next to the Approver that returned the proposal for correction

Make the requested changes and re-submit the proposal to the workflow.

Note: The above action can be completed by clicking the access link in the email sent to you, following the return of the proposal.

Activity 6 – Copying Proposal

Step No.	Instructions
1	Copying is ideal when you need to submit: The same project to multiple sponsors; The same proposal with different budgets or periods; Slightly modified scopes or personnel, or when you need to correct a mistake made on the Lead Unit for instance. Each copied proposal becomes a new, independent record with its own routing and approvals. While in the Proposal, click the Copy link located in the Proposal Toolbar
2	In the Copying this single proposal window: – Lead Unit: Select any Lead Unit you want to copy the proposal to – Budget?: Check the checkbox if you want to copy the budget – Budget Version: Select whether you want to copy All Versions or For Submission Version – **Attachments?:** Check the checkbox if you want to copy the attachments - **Questionnaires?:** Check the checkbox if you want to copy the questionnaire(s) answers - Click the Copy button