KUALI RESEARCH
COLORADO STATE UNIVERSITY

Kuali Research Create Proposal Quick Guide

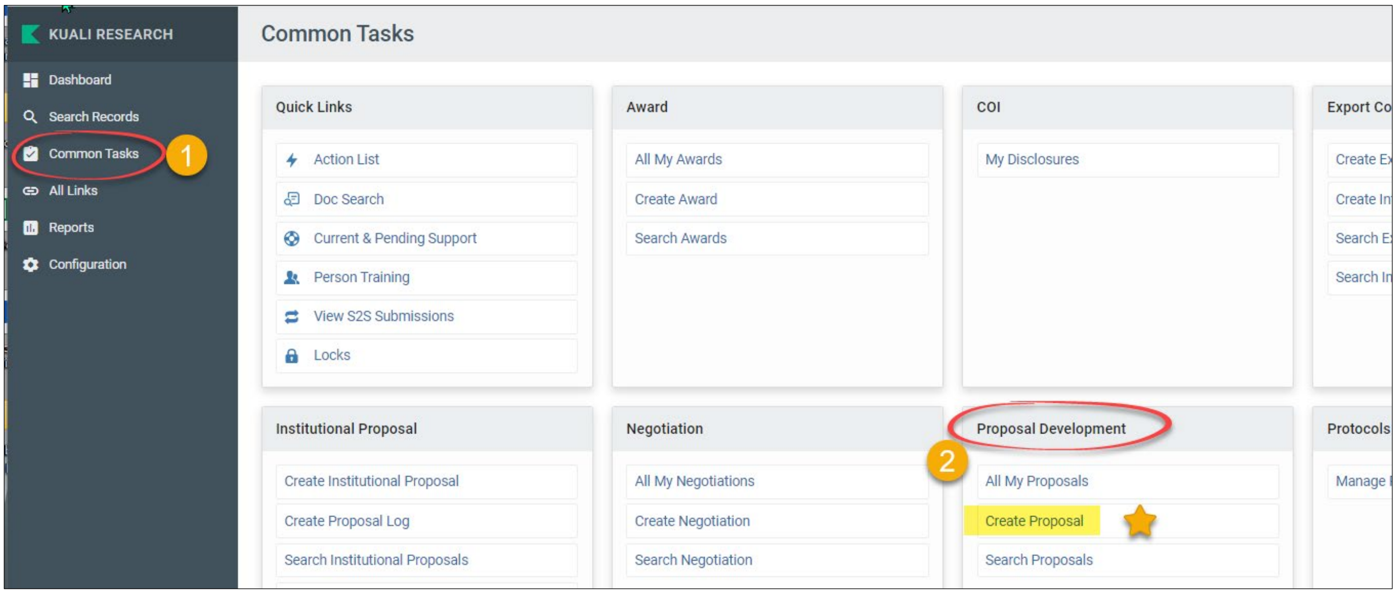
Overview:

Describes how to start a new Kuali Research Proposal, and how to request a new sponsor, if needed.

Note: CSU employees can create proposals for their ‘lead’ unit, but any user that needs to create proposals for more than one department must request the ‘proposal creator’ role for additional units.

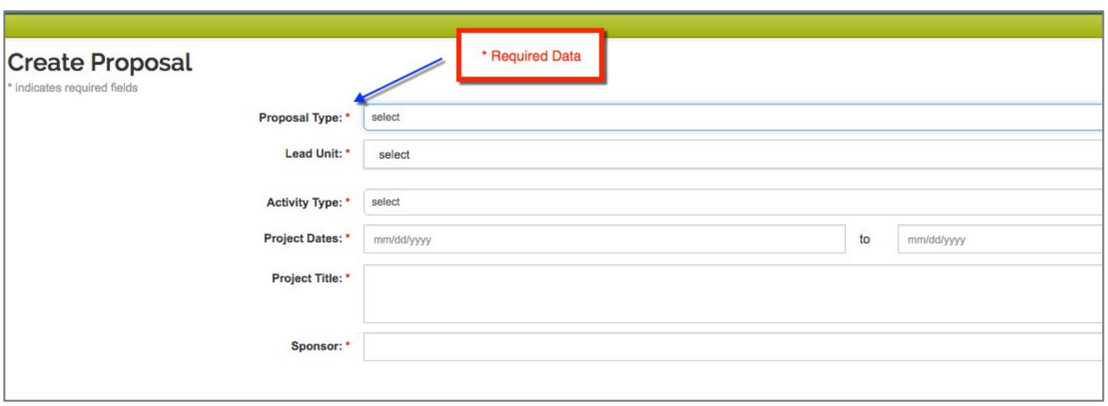
Procedure:

1. From the **Research Home** page, go to **Common Tasks** in the left navigation menu
2. On the *Proposal Development* card, choose **Create Proposal**



The **Create Proposal** window will open.

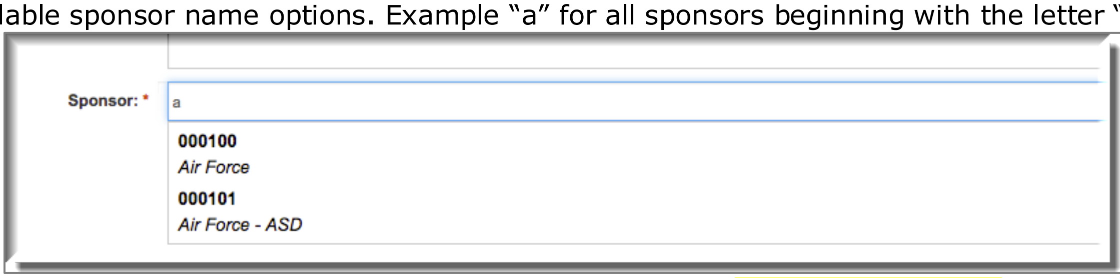
3. Complete the **Create Proposal** fields. All fields are required.



Field Name	Description
Proposal Type	Select the appropriate type from the drop-down list. A description of each type is available at the OSP website Kuali Research (KR) page: [Proposal Types]
Lead Unit	Select the applicable unit from the drop-down list. If your User Account has authorization for more than one unit, all of those units will be displayed in the drop-down list. If you have create authorization for one unit, only that until will be displayed. ***Please note:*** After clicking the **Save and Continue** button (the ‘initial’ save action), the **Lead Unit** field will become read-only and ***will not be editable.***

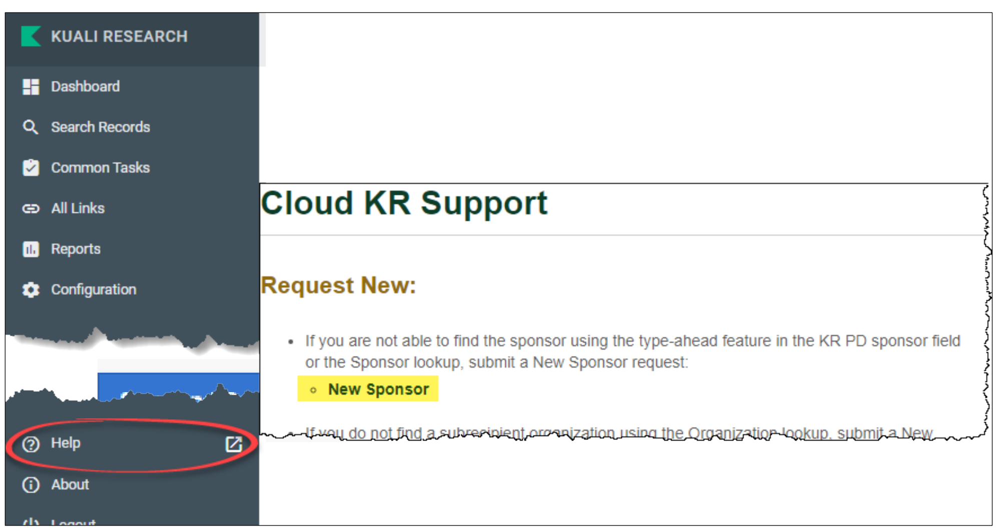
Field Name	Description
Activity Type	Select the appropriate entry from the drop-down list. More information about each type is available at the KR website: [Activity Types]
Project Dates	The Project Start and End Date. Use **date** format or the Calendar tool that appears as you click in the fields to select the date.
Project Title	Enter Title (refer to the sponsor instructions). The field limit is 200-character maximum; individual sponsors may require shorter titles. ***Please note:*** For s2s submissions, there may be additional special character restrictions.
Sponsor	**Sponsor** field should be the name of the organization (federal agency, non-profit, or commercial entity) providing funds to Colorado State. If CSU is a subrecipient (aka, subawardee or subcontractor) for the proposal, then the organization to which you are submitting your proposal is your **Sponsor** and the **Prime Sponsor** is the entity providing the funds to that organization. When applicable, the **Prime Sponsor** information is completed after the initial record is saved. *Note* – This field employs predictive typing functionality to generate suggestions. To search for the sponsor value, click the **magnifying glass** to open a separate lookup window.

Quick Tip: start typing part of the sponsor name in the sponsor field, then scroll down for available sponsor name options. Example "a" for all sponsors beginning with the letter "A":



Note: If Sponsor is *not found* in the suggestions or by search, enter code **000000**. This will allow you to save the record. The sponsor code must be corrected to a real sponsor code before the proposal can be submitted to routing for internal approvals.

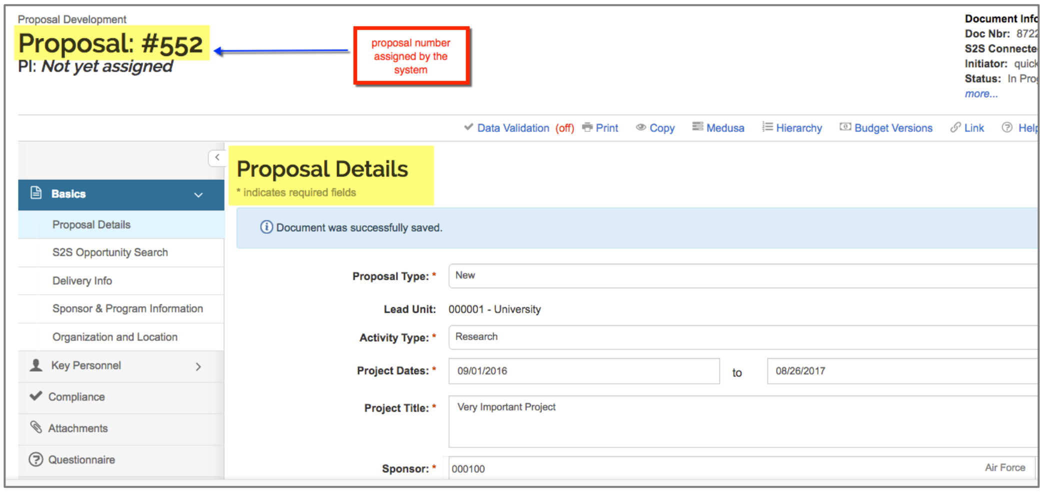
To request a new sponsor, use the left navigation menu to go to the **Help** page > choose New Sponsor item in the "Request New" section:



4. Click the **Save and Continue** button.

Note: **Cancel** button will close the screen and return you to the **Kuali Research Home** screen with no data saved.

After the page refreshes, you will be in the full proposal record, in the **Proposal Details** section. The upper left corner will display the system-assigned proposal number.



5. At this point, you can continue to enter data in the available sections, or you can close the record using the **close** button at the bottom of the page.

Note: The Principal Investigator and other Key Personnel are assigned in the **Key Personnel** section. Creating a PD record ***does not*** automatically populate the PI role.