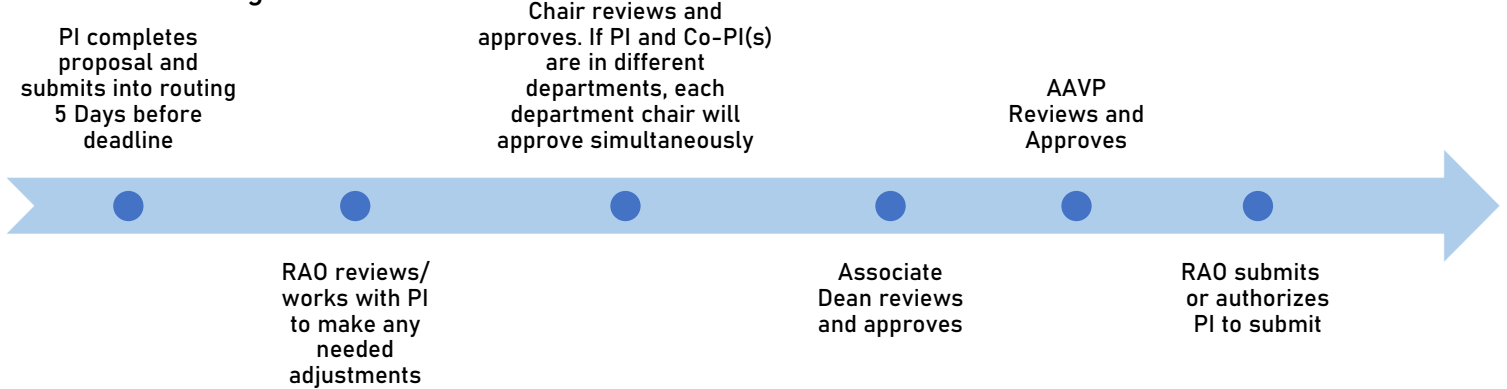


Approving Research Proposals via Kual

BYU Kual Routing



1. ACCESSING PROPOSALS

A. Via Email Notification

From: orca@byu.edu <orca@byu.edu>
 Sent: Monday, October 28, 2019 11:14 PM
 To: Jason Jay
 Subject: Kual Research Action - Proposal - APPROVE - PI: Seth Bybee - Due Date: 11/30/2019 - Lead Unit: 0991 - Sponsor: Merit Medical Systems, Inc. - Title: Awesome Biological

Please complete the APPROVE action for Seth Bybee in Proposal for "Awesome Biological "
 Your timely action is requested.
 Failure to act when an approval is requested will stop routing.

To review the requested action: [Document #9697](#)
<https://byures.kuali.co/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=9697&command=displayActionListView>

Or, to see all actions requested: [Action List](#)
<https://byures.kuali.co/res/kew/ActionList.do>, and then click on the numeric Document ID: 9697 in the first column of the List.

Action Item sent to jayj4

B. Via Kual Research Dashboard – byures.kuali.co

KUALI RESEARCH

- Dashboard Home
- Search
- Common Tasks
- All Links
- Reports
- Configuration

Dashboard Show/hide cards

Proposals routing to me Sort by

You're up! Proposal #40 – PI: Researcher, Tom – Sponsor: National Science F...
 Due date: 10/11/19 Last action: Larson, Gene; 9/03/19 11:25 AM

1 step away Proposal #31 – PI: Blotter, Jonathan – Sponsor: Alpha Tech Resear...
 Due date: 6/30/19 Last action: Tree, Dale; 9/09/19 11:01 AM

1 step away Proposal #45 – PI: Burgon, Bruce – Sponsor: National Science Foun...
 Due date: 9/10/19 Last action: Silversmith, Debbie; 7/16/19 2:27 PM

1 step away Proposal #44 – PI: Researcher, Tom – Sponsor: National Science Fo...
 Due date: 8/05/19 Last action: Howell, Larry; 7/16/19 2:24 PM

Proposals not routing Sort by

Proposal Proposal #1 – PI: admin, admin – Sponsor: National Institutes of H...
 Due date: None Last action: admin, admin; 2/20/19 9:03 AM

Proposal Proposal #3 – PI: admin, admin – Sponsor: National Institutes of H...
 Due date: 2/28/19 Last action: admin, admin; 3/07/19 11:14 AM

Proposal Proposal #4 – PI: Silversmith, Debbie – Sponsor: National Science ...
 Due date: None Last action: Nichols, David; 3/07/19 11:56 AM

Proposal Proposal #5 – PI: admin, admin – Sponsor: National Science Found...
 Due date: None Last action: admin, admin; 3/20/19 7:27 AM

Proposal Proposal #6 – PI: Silversmith, Debbie – Sponsor: National Institutes...

2. REVIEWING PROPOSALS

The link will navigate to Summary/Submit tab, with a summary of each proposal section across the summary screen. The following sections are available for review:

- Proposal Summary
- Attachments
- Budget Summary – pay attention to any proposed cost sharing
- Personnel
- Questionnaire
- Compliance
- Supplemental Info

3. APPROVE OR RETURN

Once proposal has been reviewed and is ready for approval, click on **Approve** at bottom of screen. Or, if a proposal needs revisions, click on **Return**. This will send the proposal back to the PI for further action.

Note: The Approve button will remain at the bottom of the screen as you review info under each tab. You can approve from any tab.

Kuali Research
Proposal Development
Proposal: #1
PI: Seth Bybee

Document Info
Doc Nbr: 9655
S2S Connected: [icon]
Initiator: siss
Status: Approval Pending
more...

Submit

Saved Routing Approved

Proposal Summary Personnel Compliance Attachments Questionnaire Supplemental Info Keywords Budget Summary

Proposal Summary

Title Awesome Biological Research
Principal Investigator Seth Bybee
Lead Unit 0991 - Biology (BIO)
Activity Type 1 Research - Basic (Fundamental)
Proposal Number 1
Project Start Date 06/25/2020
Project End Date 06/24/2024
Include Subaward(s)? No
Sponsor Name Merit Medical Systems, Inc.
Sponsor Deadline Date 11/30/2019
Sponsor Deadline Type Receipt

Signature indicates appropriate consideration and approval, including the following: Approval of the project, including faculty commitment. Certification that the space, equipment or other items required for the project are available or budgeted for. Approval of any cost sharing or matching requested of your unit. If work for hire (which is discouraged by BYU), that it meets the criteria described in the Questionnaire.

Send Adhoc Ad Hoc Recipients Approve Return View Route Log Submit to Sponsor More Actions Close

A comment button will open.
Comments are not required for Approvals.

If **Returning** the proposal, please add a comment/explanation. Click **OK**.

Please Select

Are you sure you want to approve this document?

Approval Comment:

Attachment:

Choose File No file chosen

OK Cancel

To View Route Log of Past, Current and Pending Approvers

- Click on View Route Log
- Actions Taken denote past approvers/approvals
- Pending Action Requests denote current approvals pending PI/Chair/Dean Action

The screenshot displays the 'Route Log' interface for proposal ID 9755. It includes a 'refresh' button in the top right corner. The main content area shows the following details:

- ID:** 9755 (with a 'hide' button)
- Title:** Awesome Psychology ; Proposal No: 7; PI: Scott Steffensen; Sponsor: Association for Psychological Sciences; Due Date: 11/30/2019
- Type:** Proposal Development Document
- Created:** 09:35 AM 11/07/2019
- Initiator:** admin, admin
- Last Modified:** 09:43 AM 11/07/2019
- Route Status:** ENROUTE
- Last Approved:**
- Document Status:**
- Document Status Modified:**
- Node(s):** PeopleFlows, JoinCostShare
- Finalized:**

Below these details is an 'Actions Taken' section with a 'hide' button. It contains a table with the following data:

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	admin, admin		09:35 AM 11/07/2019	
COMPLETED	Silversmith, Debbie		09:43 AM 11/07/2019	
APPROVED	Jay, Jason		10:42 AM 11/07/2019	

At the bottom, there is a 'Pending Action Requests' section with a 'hide' button.

GENERAL GUIDELINES FOR APPROVERS

Review the proposal considering the following:

- Is the proposal aligned with the PI's research direction/goals?
- Is this a project BYU should endorse?
- Does the budget fit the scope of the project?

Review all responses to the BYU Questionnaire, paying attention to the following:

- Is there Cost Sharing/Matching? If so, is the department/college okay with the source and amount?
- Are there publication restrictions? If so, are they reasonable?
- Is this project Work for Hire? Review the text below the Work for Hire question and discuss with the PI as needed.