



## **Kuali Research: Approver Guide**

Kuali Research Help Contact: [kr-help@umd.edu](mailto:kr-help@umd.edu)

Last updated: 11/07/24

## Locating a Routed Proposal

As an Approver, you may open the proposals you need to approve in two ways. You may either:

- 1) Reference the email notification you receive
- 2) Use the Proposals Routing to Me Dashboard card

## Method #1 - Open Proposal by Email Notification

You will receive an email from “[kr-actionlist@umd.edu](mailto:kr-actionlist@umd.edu)” with the subject of:

**Kuali Research Action - Proposal - APPROVE - PI: [PI NAME] - Due Date: [DUE DATE] - Lead Unit: [CC #] - Sponsor: [SPONSOR NAME] - Title: [TITLE]**

In the email, click on the blue document link.

**Kuali Research Action - Proposal - APPROVE - PI: Anne Elizabeth Simon - Due Date: 07/01/2024 - Lead Unit: CC010861 - Sponsor: USDA-National Institute of Food and Agriculture - Title: SP: Enhancing the e**

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**kr-actionlist@umd.edu** <kr-actionlist@umd.edu> Fri, Oct 25, 2024 at 1:58 PM  
To: kr-test@umd.edu

Please complete the APPROVE action for Anne Elizabeth Simon in Proposal for "SP: Enhancing the e"  
Your timely action is requested.  
Failure to act when an approval is requested will stop routing.

To review the requested action: [Document #6010349](#)  
<https://usmdcfg-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=docHandler&docId=6010349&command=displayActionListView>

Or, to see all actions requested: [Action List](#)  
<https://usmdcfg-sbx.kuali.co:/res/kew/ActionList.do>, and then click on the numeric Document ID: 6010349 in the first column of the List.

This link will open the proposal in the Summary/Submit Section of the proposal.

## Method #2 - Open Proposal from Proposals Routing to Me Card

The Proposals Routing to Me Card on the dashboard home page allows Approvers to easily monitor proposals queued up for approval and watch for proposals they will soon have to approve. The colored “steps” tab shows proposals that are available for your immediate approval or if they are one or more steps away. The details for each entry show a summary of information, the proposal’s due date (deadline), and who took the last action.

To open a proposal for review/approval, click on any proposal that reports “You’re Up!”. Once you or another approver on that stop has addressed all the approvals required, the proposal will be removed from this card. If a proposal is recalled or returned, it will also be removed from the card.

**Steps Away From Your Approval**

Proposals routing to me Filter Sorting Order

Proposals routing to me 1 Filter Applied Sort by

**You're up!**  
Alternate  
Proposal #85198 – PI: Simon, Anne Elizabeth – Sponsor: USDA-National Institute of Food and Agriculture – Title: SP: Enhancing the efficac... – Lead unit: C...  
Due date: 7/01/2024 Last action: 7/01/2024 10:52 AM Compliance

**1 step away**  
Alternate  
Proposal #84881 – PI: Lee, Vincent T. – Sponsor: NIH-National Institutes of Health (Other Institute) – Title: Linear diribonucleotides ... – Lead unit: CC010861  
Due date: 7/05/2024 Last action: 7/01/2024 5:37 PM Compliance

[Compliance Items](#)

If you are an alternate approver, the word Alternate will be displayed below You’re Up! and 1 step away.

**You're up!**  
Alternate

**1 step away**  
Alternate

### Filter

Where  is  ×

[+ Add a Filter](#)

### Sorting Options

Ascending  Descending

Deadline Date

Last Action Taken Date

Principal Investigator

Proposal Number

Sponsor Name

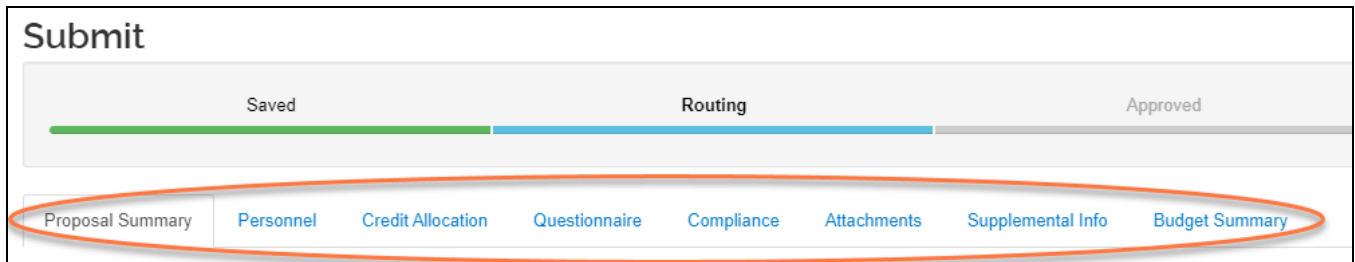
Steps to Approve

### Missing Updates?

If someone performed an action between 3:30 a.m. and 5:30 a.m. ET, it may not be reflected on the dashboard or "Search Records" page results due to a KR job that runs overnight to re-index dashboard data. You may reference emails (which still get sent during this timeframe) or use the Common Tasks > "Search Proposal Development" page to retrieve and review your proposal. If the proposal is edited or approved, it will show back up on the dashboard and "Search Records" page results that day. Otherwise, the proposal will appear as expected after the overnight job runs again.

## Reviewing the Proposal

Once you've opened the proposal, the Summary/Submit Section allows you to view most of its details easily within the same section.



**Proposal Summary Tab:** Basic proposal details (Title, PI, Lead Unit, Prop #, Dates, Sub?, Sponsor, Deadline)

**Personnel Tab:** All personnel listed on the project and their certification answers

**Credit Allocation Tab:** DRIF/Credit Split allocation

**Compliance Tab:** All Special Review items that apply to this proposal

**Attachments Tab:** All Proposal, Personnel, and Internal attachments are available to be viewed

**Questionnaires Tab:** All questionnaire questions and answers

**Supplemental Info Tab:** Info such as Admin Costs, IDC Rate, Type, & Reason, Sponsor & Budget Contacts.

**Keywords Tab:** UMD does not use

**Budget Summary Tab:** Displays budget details by period and totals, personnel and non-personnel costs.

# Approving the Proposal

Once you're ready to approve the proposal, click the [Approve] button at the bottom of the Summary/Submit page.

**Submit**

Progress: Saved | **Routing** | Approved

Navigation: Proposal Summary | Personnel | Credit Allocation | Questionnaire | Compliance | Attachments | Supplemental Info | Budget Summary

### Proposal Summary

Title	SP: Enhancing the efficacy of current treatments to provide a lasting solution to HLB
Principal Investigator	Anne Elizabeth Simon
Lead Unit	CC010861 - CMNS-Cell Biology & Molecular Genetics
Proposal Type	New
Activity Type	Research - Basic
Proposal Number	85198
Project Start Date	10/01/2024
Project End Date	09/30/2027
Include Subaward(s)?	Yes
Sponsor Name	USDA-National Institute of Food and Agriculture
Prime Sponsor Name	
Sponsor Deadline Date	07/01/2024
Sponsor Deadline Type	Receipt

Approval signifies that the proposed project fits within the academic framework and resources of the unit/college, requirements for new or renovated facilities/space/equipment have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, concurrence from all participating units has been received by the lead unit, and in general indicates approval and concurrence with the statements made and questions answered within this proposal. Approval signifies that this proposal may be processed and submitted.

Buttons: Send Adhoc | Ad Hoc Recipients | **Approve** | Return | View Route Log | More Actions | Close

## Approving at more than one stop

If you are an approver at more than one stop, you must close the proposal and open it again from the Dashboard card or a separate email message.

## Proposal Return

If you spot any problems and would like to "Return" the proposal to the Aggregator for correction, you may click on the [Return] button. Returning a proposal will remove it from the routing process to be corrected and require the aggregator to resubmit it to repeat the approval routing process. You may also contact the aggregator outside of Quali Research directly if you wish to report an issue.

Buttons: Send Adhoc | Ad Hoc Recipients | Approve | **Return** | View Route Log | More Actions | Close

Click [Return] at the bottom of the page

You must enter a Return Reason, which will be shown as an annotation on the route log.

Please Select ✕

Are you sure you want to return this document?

**Return Reason: \***

**Attachment:**

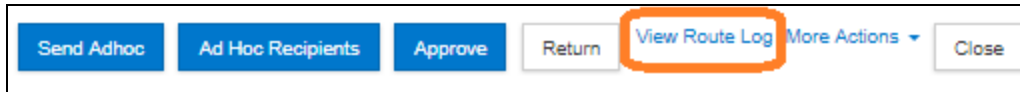
No file chosen

Once you return the proposal, it will be shown on the Aggregator's Proposal Not Routing Card.

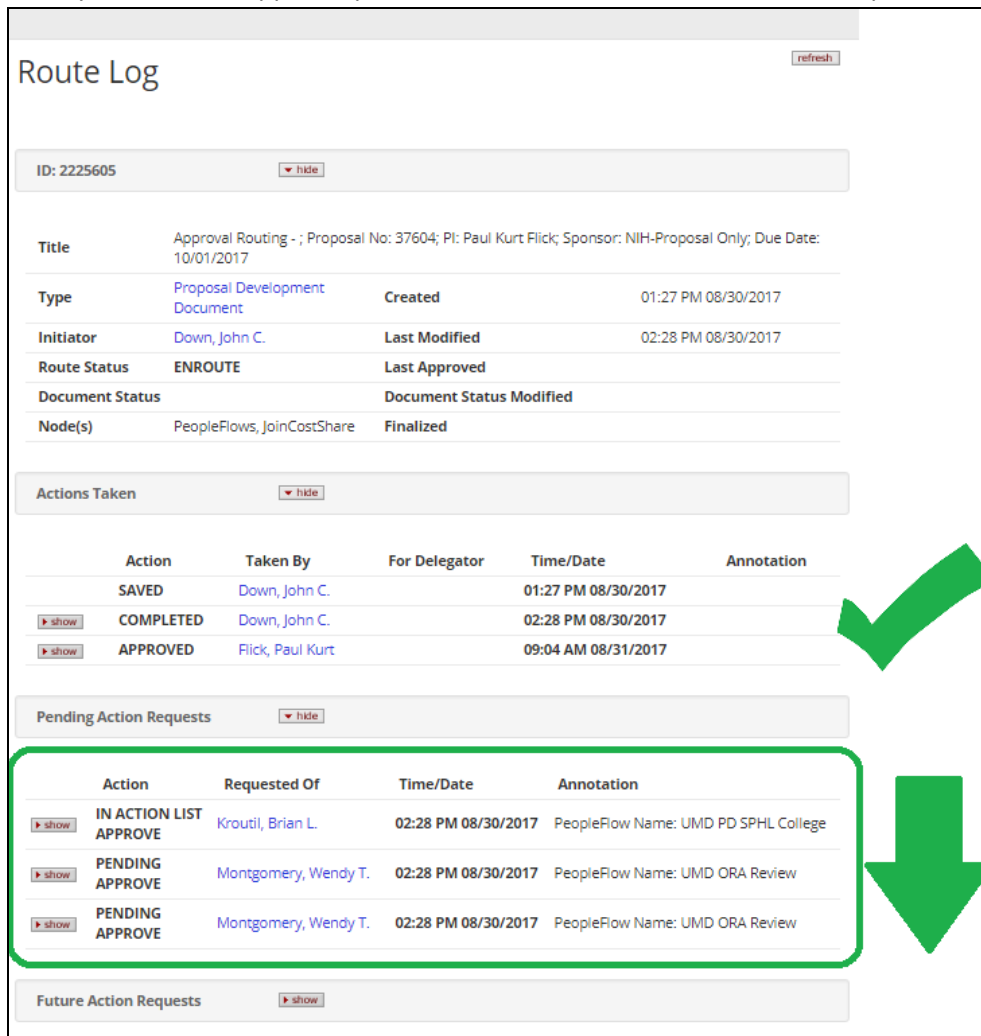
# Viewing the Approval Status

## Routing Map from the Proposal Development Module

If you wish to see who has approved a proposal or review where the proposal is in the routing process, you may click on the Summary/Submit section of the proposal and then click on the **[View Route Log]** button at the bottom.



Once the Route log is open, view the **Pending Action Requests** panel. This panel shows each approval stop that the proposal must fulfill, in order, from top to bottom, before being submitted to the sponsor. Any actions already taken in the approval process will be shown in the **Actions Taken** panel.



**Route Log** refresh

ID: 2225605 hide

**Title** Approval Routing - ; Proposal No: 37604; PI: Paul Kurt Flick; Sponsor: NIH-Proposal Only; Due Date: 10/01/2017

**Type** Proposal Development Document **Created** 01:27 PM 08/30/2017

**Initiator** Down, John C. **Last Modified** 02:28 PM 08/30/2017

**Route Status** ENROUTE **Last Approved**

**Document Status** Document Status Modified

**Node(s)** PeopleFlows, JoinCostShare **Finalized**

**Actions Taken** hide

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Down, John C.		01:27 PM 08/30/2017	
<span>show</span> COMPLETED	Down, John C.		02:28 PM 08/30/2017	
<span>show</span> APPROVED	Flick, Paul Kurt		09:04 AM 08/31/2017	

**Pending Action Requests** hide

Action	Requested Of	Time/Date	Annotation
<span>show</span> IN ACTION LIST APPROVE	Kroutil, Brian L.	02:28 PM 08/30/2017	PeopleFlow Name: UMD PD SPHL College
<span>show</span> PENDING APPROVE	Montgomery, Wendy T.	02:28 PM 08/30/2017	PeopleFlow Name: UMD ORA Review
<span>show</span> PENDING APPROVE	Montgomery, Wendy T.	02:28 PM 08/30/2017	PeopleFlow Name: UMD ORA Review

**Future Action Requests** show

NOTE: The route log consists of 4 different panels.

- **ID:** General Information on the Proposal
- **Actions Taken:** Shows what actions have already taken place in the approval process
- **Pending Action Requests:** Shows remaining actions left in the approval process
- **Future Action Requests:** This will be blank if you are currently in the approval process. This shows what actions will take place before routing

## Proposal Workload Card from the Dashboard

This card allows anyone with Proposal view access to see which proposals are still currently in the process of being approved across all routing stops. Unlike the “Proposals Routing to Me” card, you will see each proposal listed throughout the entire approval process once it has been submitted for approval. When viewing the “Current Request(s)” column, you can observe who the current primary approver is (e.g. Chair, Dean, ORA Representative). The “Assigned Approver” field will always be blank. Once a proposal has been completely approved, it will be removed from this card. If a proposal is recalled or returned, it will also be removed from the card until it gets routed for approval again.

Proposal workload assignments Click Any Column Header to Sort

Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#85198	Simon, Anne Elizabeth	USDA-National Institute of Food and Agriculture	CC010861	SP: Enhancing the efficacy of current treatments to provide a lasting solution to HLB	07/01/2024	10/25/2024 2:00 PM	Mclver, Kevin S.	
#84889	Shi, Meiqing	NIH-Proposal Only	CC010693	Mechanisms of brain invasion by Cryptococcus neoformans	07/03/2024	10/15/2024 12:26 PM	Vernon, Jessica A.	
#85269	Hui, Bronson	Language Learning Journal	CC010739	SLLC Language Learning Are Formulaic Sequences Actually Vocabulary: A Perspective from Assessment and the Contributions of PSTM and Exposure	07/15/2024	10/15/2024 12:15 PM	Scullen, Mary Ellen	
#85139	Ogawa, Sanshiro	Educational Testing Service	CC010739	SLLC ETS Evaluation of the Use of AI Voices in the TOEFL Junior Standard Test Listening Section	07/15/2024	07/01/2024 6:18 PM	Wright, Julie O'Donnell	
#85397	Sztejn, Marcelo B.	NIH-National Institutes of Health	10218000	Immune Mechanisms of Protection in Salmonella Infection and Vaccination in Humans	07/05/2024	07/01/2024 5:52 PM	UMB SOM Deans Office Approvers	
#84960	Santamaria Artigas, Andres Eduardo	NASA - Goddard Space Flight Center	CC010769	Participation in the ESA Sentinel-3 NG Mission Advisory Group to Ensure Surface Reflectance Data Continuity of NASA EOS Missions	07/09/2024	07/01/2024 5:44 PM	Hunsaker, Rebecca I	
#85348	Janowski, Mirosław	University of Maryland, College Park	10403000	Automated Stem Cell Radiolabeling via 3D Microprinting-Enabled Microfluidics	07/02/2024	07/01/2024 5:41 PM	UMB SOM Deans Office Approvers	
#84881	Lee, Vincent T.	NIH-National Institutes of Health (Other Institute)	CC010861	Linear diribonucleotides regulation of bacterial physiology and chronic biofilm infections	07/05/2024	07/01/2024 5:37 PM	Peters, Stephanie L.	
#85338	Agonafer, Damena	University of Kansas Center for Research, Inc	CC010925	MOU for the Collaborative NSF EARTH Proposal (NSF 22-580) - Updated	07/08/2024	07/01/2024 4:31 PM	Egloff, Sally Lo	
#85188	Sin, Steve S	Culmen International	CC010752	Non-Disclosure Agreement between Culmen International and START for the Biological Laboratory Network Mapping Assessment and Optimization in Chile Project	06/26/2024	07/01/2024 4:10 PM	Egloff, Sally Lo	

Rows per page: 10 ▾ 1-10 of 536

Click Proposal Number to Open Record Increase Rows Viewable per Page View Additional Records

### ⌚ Missing Updates?

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# KR Notification Emails

KR Notification Emails all come from [kr-actionlist@umd.edu](mailto:kr-actionlist@umd.edu)

Action	Email Subject	Email Message	Recipient
Proposal Created (Not a Copy)	Proposal No. [PROPDEV #] in Department [LEAD_UNIT# - LEAD_UNIT_NAME] has been created by [INITIATOR]	Attention Office of Sponsored Programs Proposal No. [PROPDEV#] has been created in Kual Research. Proposal No: [PROPDEV#] Proposal Initiator: Basic10 User Department: [LEAD_UNIT# -LEAD_UNIT_NAME] [SPONSOR# - SPONSOR NAME] Proposal Title: [TITLE] Due Date: [DUE DATE]	Contract Administrator, Unit Administrators
Notify Investigator Certification Required	Regarding your involvement in Development Proposal [TITLE]	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: [DOC ID#] Proposal Number: [PROPDEV#] LINK Proposal Title: [TITLE] Principal Investigator: [PI_NAME] Lead Unit: [LEAD_UNIT# - LEAD_UNIT_NAME] Sponsor: [SPONSOR# - SPONSOR NAME] Deadline Date: [DEADLINE_DATE]	The Investigator Notified
All Proposal Persons Certification Completed (note: this will be sent when all named personnel listed certify, regarding the role)	All Proposal Persons Certification Completed for [PROPDEV#]	All of the Proposal Person Certifications are completed. Proposal Details as follows: Document Number: [DOC ID#] Proposal Number: [PROPDEV#] Proposal Title: [TITLE] Principal Investigator: [PI_NAME] Lead Unit: [LEAD_UNIT# - LEAD_UNIT_NAME] Sponsor: [SPONSOR# - SPONSOR NAME] Deadline Date: [DEADLINE_DATE]	Initiator
Proposal is ready for approval for Primary Approver	Kuali Research Action - Proposal - APPROVE - PI: [PI NAME] - Due Date: [DUE DATE] - Lead Unit:[LEAD UNIT] - Sponsor: [SPONSOR] - Title: [TITLE]	Please complete the APPROVE action for [PI NAME] in Proposal for [TITLE] Your timely action is requested. Failure to act when an approval is requested will stop routing.  To review the requested action: [Document #] [LINK] <a href="https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=doHandler&amp;docId=[DOC ID#]&amp;command=displayActionListView">https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=doHandler&amp;docId=[DOC ID#]&amp;command=displayActionListView</a>  Or, to see all actions requested: <a href="#">Action List [LINK]</a> <a href="https://umd-sbx.kuali.co:/res/kew/ActionList.do">https://umd-sbx.kuali.co:/res/kew/ActionList.do</a> , and then click on the numeric Document ID: [DOC ID#] in the first column of the List.  Action Item sent to [USER ID]	Approver
Proposal is ready for approval for Secondary Approver	Kuali Research Action - Proposal - APPROVE - PI: [PI NAME] - Due Date: [DUE DATE] - Lead Unit:[LEAD UNIT] - Sponsor: [SPONSOR] - Title: [TITLE]	Please complete the APPROVE action for [PI NAME] in Proposal for [TITLE] Your timely action is requested.  Failure to act when an approval is requested will stop routing. To review the requested action: [Document #] [LINK]  <a href="https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=doHandler&amp;docId=[DOC ID#]&amp;command=displayActionListView">https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=doHandler&amp;docId=[DOC ID#]&amp;command=displayActionListView</a> Or, to see all actions requested: <a href="#">Action List [LINK]</a>  <a href="https://umd-sbx.kuali.co:/res/kew/ActionList.do">https://umd-sbx.kuali.co:/res/kew/ActionList.do</a> , and then click on the numeric Document ID: [DOC ID#] in the first column of the List.  <b>For additional help, email &lt;mailto:kr-actionlist@umd.edu&gt;</b> Action Item sent to [SECONDARY APPROVER USERID] for delegate type SECONDARY	Secondary (Alternate) Approver

Action	Email Subject	Email Message	Recipient
Proposal Approved by Another	Proposal [PROPDEV#] Approved by Another User	<p><b>Prop Dev Number</b> [PROPDEV#]  <b>PI</b> [PI_NAME]  <b>Lead Unit</b> [LEAD_UNIT# - LEAD_UNIT_NAME]  <b>Sponsor Name</b> [SPONSOR# - SPONSOR NAME]  <b>Title</b> [TITLE]  <b>Deadline</b> [DEADLINE_DATE]</p> <p>[PI_NAME]'s Proposal [PROPDEV#] has been approved by another user. You can view this proposal through KC at the following address:  <a href="#">Open document (LINK)</a>  If you have questions, please contact [PROPOSAL INITIATOR USERID]  Thank you</p>	Other Approvers on Current Stop
Proposal Returned by Approver	[PI_NAME]'s Proposal [PROPDEV#] has been returned to the Aggregator	<p><b>Prop Dev Number</b> [PROPDEV#]  <b>PI</b> [PI_NAME]  <b>Lead Unit</b> [LEAD_UNIT# - LEAD_UNIT_NAME]</p> <p><b>Sponsor Name</b> [SPONSOR# - SPONSOR NAME]  <b>Prime Sponsor Name</b> [PRIME_SPONSOR# - PRIME_SPONSOR NAME]  <b>Title</b> [TITLE]  <b>Deadline</b> [DEADLINE_DATE]  <b>Sponsor Announcement</b> [OPPORTUNITY_ID# - OPPORTUNITY_TITLE]</p> <p>[PI_NAME]'s Proposal 37261 has been returned to the Aggregator. You can view this proposal through KC at the following address:  <a href="#">Open document (LINK)</a>  The referenced proposal has been returned to the Aggregator for revisions and has been removed from your action list. This notification has been sent to all approvers at this stop.  If you have questions, please contact [PROPOSAL INITIATOR USERID]  Thank you</p>	Other Approvers on Current Stop
Proposal Recalled	Action List Reminder	<p>Your Action List has an eDoc(electronic document) that needs your attention:</p> <p>Document ID: [DOC ID#]  Initiator: [AGGREGATOR]  Type: Add/Modify ProposalDevelopmentDocument  Title: [TITLE]; Proposal No: [PROPDEV#]; PI: [PI NAME]; [SPONSOR];  Due Date: [DUE DATE]</p> <p>To respond to this eDoc:  Go to  <a href="https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=dochandler&amp;docId=[PROPDEV#]&amp;command=displayActionListView">https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=dochandler&amp;docId=[PROPDEV#]&amp;command=displayActionListView</a></p> <p>Or you may access the eDoc from your Action List:  Go to <a href="https://umd-sbx.kuali.co:/res/kew/ActionList.do">https://umd-sbx.kuali.co:/res/kew/ActionList.do</a>, and then click on the numeric Document ID: [DOC ID#] in the first column of the List.</p> <p>To view the route log of this document:  Go to <a href="https://umd-sbx.kuali.co:/res/kew/RouteLog.do?documentId=[DOC ID#]">https://umd-sbx.kuali.co:/res/kew/RouteLog.do?documentId=[DOC ID#]</a></p> <p>To change how these email notifications are sent(daily, weekly or none):  Go to <a href="https://umd-sbx.kuali.co:/res/kew/Preferences.do">https://umd-sbx.kuali.co:/res/kew/Preferences.do</a></p> <p>For additional help, email &lt;<a href="mailto:kr-actionlist@umd.edu">mailto:kr-actionlist@umd.edu</a>&gt;  Action Item sent to [AGGREGATOR]</p>	Aggregator that Recalled the Proposal

Action	Email Subject	Email Message	Recipient
Proposal Approval Completed - Created Institute Proposal Record	<b>[LEAD UNIT#]- Proposal [PROPDEV#]</b> is submitted	The Proposal <b>[PROPDEV#]</b> has been submitted to sponsor. The institute proposal number is <b>[IP#]</b> .	Aggregators, Added Recipients [Prompted by User]
Attachment Updated During Approval Routing	<b>[LEAD UNIT#]</b> - Notification : Narrative added to proposal : <b>[PROPDEV#]</b>	A new attachment is uploaded for Proposal : 37256, Module No. 1 have been changed. Narrative Type: <b>[ATTACHMENT_TAB]</b> Module Description: <b>[TITLE_OF_ATTACHMENT]</b>	Past Approvers, Added Recipients [Prompted by User]
Data Override Update Took Place During Routing	<b>[LEAD UNIT#]</b> - Notification	<b>[FIELD_CHANGED]</b> for proposal <b>[PROPDEV#]</b> has been changed to <b>[COMMENT]</b>	Aggregators, OSP Admin (CA), Added Recipients [Prompted by User]

## Still have questions?

We're here to help!

Email Kual Research Help: [kr-help@umd.edu](mailto:kr-help@umd.edu)