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” with a subject of:
Kuali Research Action - Proposal - APPROVE - PI: [PI NAME] - Due Date: [DUE DATE] - Lead Unit: [LEAD UNIT #] - Sponsor: [SPONSOR NAME] - Title: [TITLE]
In the email, click on the Document link in blue.

This link will open the proposal on 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 that are queued up for their approval and watch for proposals they will soon have to approve. The colored “steps” tab shows you proposals that are available for your immediate approval or if it’s one or more steps away. The details for each entry shows a summary of information along with 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 have 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.

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

Reviewing the Proposal

Once you’ve opened the proposal, the Summary/Submit Section allows you to easily view most details of the proposal all 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.

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**Approving the Proposal**

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

![Submit Page Screenshot]

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**Approving at more than one stop**

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

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**Proposal Return**

If you spot any problems and would like to “Return” the proposal back to the Aggregator for correction, you may click on the [Return] button. Returning a proposal will take the proposal out of the routing process to be corrected and will need to be resubmitted by the aggregator to repeat the approval routing process. You may alternatively contact the aggregator outside of Kuali Research directly if you wish to report an issue.

![Return Button]

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

**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.
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:** If currently in the approval process, this will be blank. This shows what actions will take place prior to 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

<table>
<thead>
<tr>
<th>Proposal Number</th>
<th>Principal Investigator</th>
<th>Sponsor</th>
<th>Unit</th>
<th>Title</th>
<th>Due Date</th>
<th>Last Action</th>
<th>Current Request(s)</th>
<th>Assigned Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>#5431</td>
<td>Kang, Christina</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>09/01/2023</td>
<td>11:00 AM</td>
<td>Chapman, Ashley</td>
<td>NYU</td>
</tr>
<tr>
<td>#5456</td>
<td>Park, Michael</td>
<td>DOT</td>
<td>ORES</td>
<td>SAA</td>
<td>10/01/2023</td>
<td>10:00 AM</td>
<td>Parker, John</td>
<td>NYU</td>
</tr>
<tr>
<td>#5480</td>
<td>Parks, Michael</td>
<td>ICF</td>
<td>ORES</td>
<td>SAA</td>
<td>11/01/2023</td>
<td>11:00 AM</td>
<td>Montgomery, Wendy</td>
<td>NYU</td>
</tr>
<tr>
<td>#5489</td>
<td>Banks, Michelle</td>
<td>Corps</td>
<td>ORES</td>
<td>SAA</td>
<td>12/01/2023</td>
<td>12:00 AM</td>
<td>Parker, John</td>
<td>NYU</td>
</tr>
<tr>
<td>#5502</td>
<td>Tomita, Alva</td>
<td>USDA</td>
<td>OCG</td>
<td>SAA</td>
<td>01/01/2023</td>
<td>01:00 AM</td>
<td>Chapman, Ashley</td>
<td>NYU</td>
</tr>
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<td>#5511</td>
<td>Down, John</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>02/01/2023</td>
<td>02:00 AM</td>
<td>Schwartz, Charles</td>
<td>NYU</td>
</tr>
<tr>
<td>#5520</td>
<td>Down, John</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>03/01/2023</td>
<td>03:00 AM</td>
<td>Schwartz, Charles</td>
<td>NYU</td>
</tr>
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<td>#5530</td>
<td>Down, John</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>04/01/2023</td>
<td>04:00 AM</td>
<td>Schwartz, Charles</td>
<td>NYU</td>
</tr>
<tr>
<td>#5540</td>
<td>Down, John</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>05/01/2023</td>
<td>05:00 AM</td>
<td>Schwartz, Charles</td>
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<td>#5550</td>
<td>Down, John</td>
<td>NSF</td>
<td>ORES</td>
<td>SAA</td>
<td>06/01/2023</td>
<td>06:00 AM</td>
<td>Schwartz, Charles</td>
<td>NYU</td>
</tr>
</tbody>
</table>

- Click Proposal Number to Open Record
- Increase Rows Viewable per Page
- View Additional Records
## KR Notification Emails

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Email Subject</th>
<th>Email Message</th>
<th>Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Created (Not a Copy)</td>
<td>Proposal No. [PROPDEV#] in Department [LEAD_UNIT# - LEAD_UNIT_NAME] has been created by [INITIATOR]</td>
<td>Attention Office of Sponsored Programs Proposal No. [PROPDEV#] has been created in Kuali Research. Proposal No: [PROPDEV#] Proposal Initiator: Basic10 User Department: [LEAD_UNIT# - LEAD_UNIT_NAME] [SPONSOR# - SPONSOR NAME] Proposal Title: [TITLE] Due Date: [DUE DATE]</td>
<td>Contract Administrator, Unit Administrators</td>
</tr>
<tr>
<td>Notify Investigator Certification Required</td>
<td>Regarding your involvement in Development Proposal [TITLE]</td>
<td>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]</td>
<td>The Investigator Notified</td>
</tr>
<tr>
<td>All Proposal Persons Certification Completed (note: this will be sent when all named personnel listed certify, regarding the role)</td>
<td>All Proposal Persons Certification Completed for [PROPDEV#]</td>
<td>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]</td>
<td>Initiator</td>
</tr>
<tr>
<td>Action</td>
<td>Email Subject</td>
<td>Email Message</td>
<td>Recipient</td>
</tr>
<tr>
<td>--------</td>
<td>--------------</td>
<td>---------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Proposal Returned by Approver</td>
<td>[PI_NAME]’s Proposal [PROPDEV#] has been returned to the Aggregator</td>
<td>Prop Dev Number [PROPDEV#] PI [PI_NAME] Lead Unit [LEAD_UNIT# - LEAD_UNIT_NAME] Sponsor Name [SPONSOR# - SPONSOR NAME] Prime Sponsor Name [PRIME_SPONSOR# - PRIME_SPONSOR NAME] Title [TITLE] Deadline [DEADLINE_DATE] Sponsor Announcement [OPPORTUNITY_ID# - OPPORTUNITY_TITLE]</td>
<td>Other Approvers on Current Stop</td>
</tr>
<tr>
<td>Proposal Recalled</td>
<td>Action List Reminder</td>
<td>Your Action List has an eDoc(electronic document) that needs your attention: Document ID: [DOC ID#] Initiator: [AGGREGATOR] Type: Add/Modify ProposalDevelopmentDocument Title: [TITLE]; Proposal No: [PROPDEV#]; PI: [PI NAME]; [SPONSOR]; Due Date: [DUE DATE]</td>
<td>Aggregator that Recalled the Proposal</td>
</tr>
</tbody>
</table>

To respond to this eDoc:
- Go to https://umd-sbx.kuali.co:/res/kc-pd-krad/proposalDevelopment?methodToCall=do cHandler&docId=[PROPDEV#]&command=displayActionListView

Or you may access the eDoc from your Action List:
- Go to https://umd-sbx.kuali.co:/res/kew/ActionList.do, and then click on the numeric Document ID: [DOC ID#] in the first column of the List.

To view the route log of this document:
- Go to https://umd-sbx.kuali.co:/res/kew/RouteLog.do?documentId=[DOC ID#]

To change how these email notifications are sent (daily, weekly or none):
- Go to https://umd-sbx.kuali.co:/res/kew/Preferences.do

For additional help, email <mailto:kr-actionlist@umd.edu>
Action Item sent to [AGGREGATOR]
<table>
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<tr>
<th>Action</th>
<th>Email Subject</th>
<th>Email Message</th>
<th>Recipient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Approval Completed - Created Institute Proposal Record</td>
<td>[LEAD UNIT#]-Proposal [PROPDEV#] is submitted</td>
<td>The Proposal [PROPDEV#] has been submitted to sponsor. The institute proposal number is [IP#].</td>
<td>Aggregators, Added Recipients [Prompted by User]</td>
</tr>
<tr>
<td>Attachment Updated During Approval Routing</td>
<td>[LEAD UNIT#] - Notification: Narrative added to proposal: [PROPDEV#]</td>
<td>A new attachment is uploaded for Proposal: 37256, Module No. 1 have been changed. Narrative Type: [ATTACHMENT_TAB] Module Description: [TITLE_OF_ATTACHMENT]</td>
<td>Past Approvers, Added Recipients [Prompted by User]</td>
</tr>
<tr>
<td>Data Override Update Took Place During Routing</td>
<td>[LEAD UNIT#] - Notification</td>
<td>[FIELD_CHANGED] for proposal [PROPDEV#] has been changed to [COMMENT]</td>
<td>Aggregators, OSP Admin (CA), Added Recipients [Prompted by User]</td>
</tr>
</tbody>
</table>

Still have questions?

We’re here to help!
Email Kuali Research Help: kr-help@umd.edu