



**K**uali Coeus

PORTICO

at

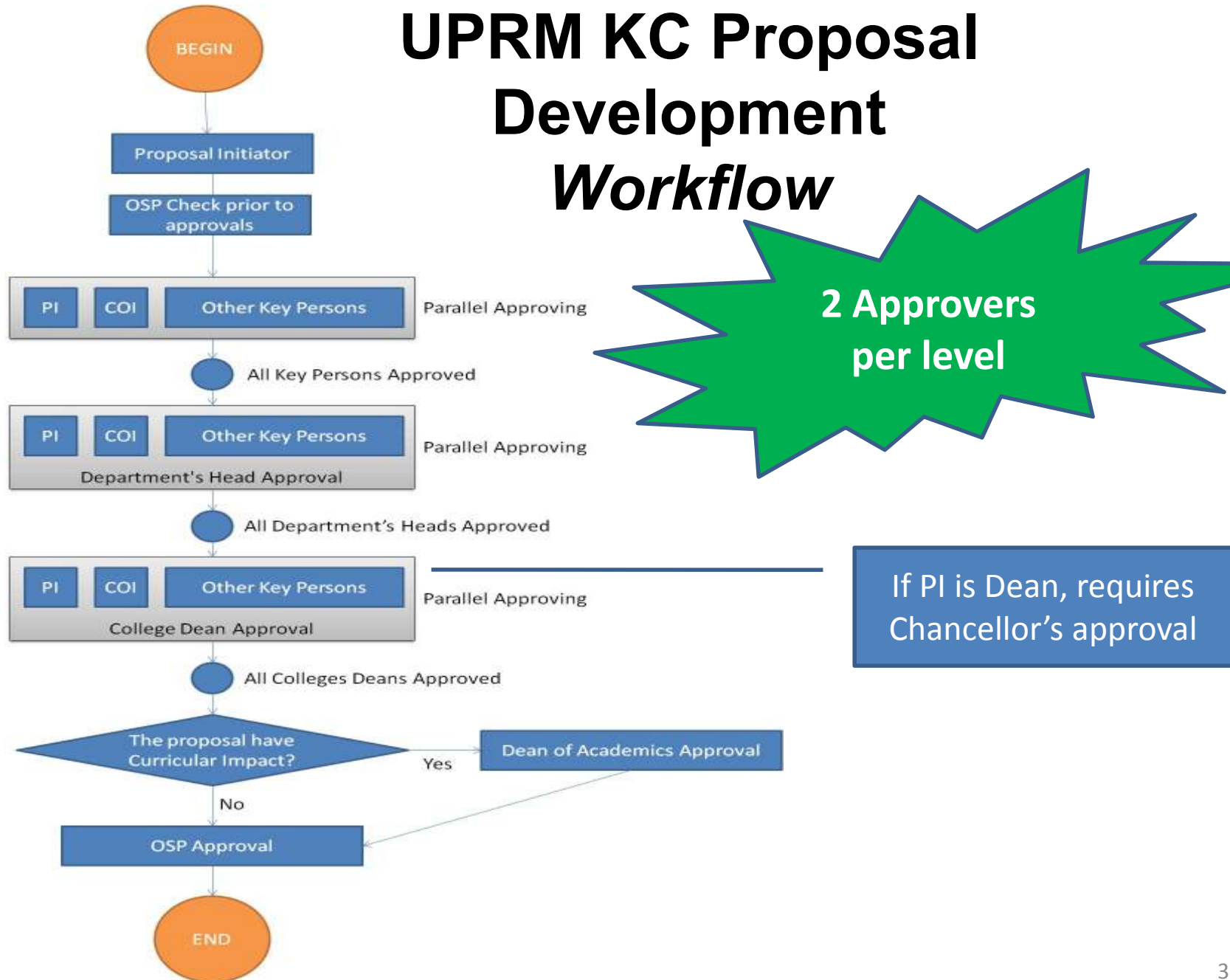
**UPRM**

# Kuali Coeus @UPRM Workshop for Approvers

*Updated January 18, 2014*

- ✓ **KC Proposal Routing at UPRM**
- ✓ **Approval procedure at UPRM**
  - *Commitment of Institutional Resources*
  - *Access to Proposal Development Docs*
  - *Action List & Questions flags*

# UPRM KC Proposal Development Workflow



# Two ways to access KC to complete the approval process

1. Respond via the email generated via KC which has direct links to the proposal of interest.

To respond to this eDoc:

Go to <https://kuali.uprm.edu:443/kc/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=3299&command=displayActionListView>

Or you may access the eDoc from your Action List:

Go to <https://kuali.uprm.edu:443/kc/kew/ActionList.do>, and then click on the numeric Document ID: 3299 in the first column of the List.

2. Enter Kuali Coeus and search the Action List, to access the proposal pending action.

# Option 1: Approver receives email

**From:** noreply@kuali.uprm.edu

**Subject: Action List Reminder**

**Date:** November 5, 2013 at 3:27:40 PM AST

**To:** [omarpr@gmail.com](mailto:omarpr@gmail.com)

Action List

Your Action List has an eDoc (electronic document) that needs your attention:

**Document ID: 3533**

Use Document ID to access  
FULL proposal package

**Initiator:** EALBINO

**Type:** Add/Modify ProposalDevelopmentDocument

**Title:** Test Emails 2; Proposal No: 83; **PI: MARISOL VERA COLON;**

**Sponsor: NIH; Due Date: 11/15/2013**

PI, Sponsor, Due Date



**Example of an email received by approver upon submission of proposal by PI**

Email provides links to access the KC Action List directly.  
Recommendation:

1. Go to Questions section for **Institutional Commitment information**
2. Proceed to Approve, Disapprove or Send for Revision.

Search bar with magnifying glass icon and "+MARI" text.

Navigation icons: back, forward, alert, trash, folder, tag, and "More" dropdown.

From: noreply@kuali.uprm.edu 4:17 PM (1 hour ago) ☆

To: marisol.vera

Language: English > Bengali Translate message Turn off for: English x

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 3299  
Initiator: VERA COLON, MARISOL  
Type: Add/Modify ProposalDevelopmentDocument  
Title: Testing KC Producti; Proposal No: 2; PI: MARISOL VERA COLON; Sponsor: National Science Foundation; Due Date: 04/15/2015

To respond to this eDoc:  
Go to <https://kuali.uprm.edu:443/kc/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=3299&command=displayActionListView>

Or you may access the eDoc from your Action List:  
Go to <https://kuali.uprm.edu:443/kc/kew/ActionList.do>, and then click on the numeric Document ID: 3299 in the first column of the List.

To change how these email notifications are sent(daily, weekly or none):  
Go to <https://kuali.uprm.edu:443/kc/kew/Preferences.do>

## Option 2: Access Quali Coeus ACTION LIST

- Log in to Quali Coeus.
- Go to **action list** in the **Researcher** TAB.



The screenshot displays the Quali Coeus PORTICO at UPRM interface. The top navigation bar includes the Quali Coeus logo, the text "PORTICO at UPRM", and a "Provide Feedback" link. Below this, there are tabs for "Researcher", "Unit", "Central Admin", "Maintenance", and "System Admin". The "Researcher" tab is selected. In the main content area, there are buttons for "action list" and "doc search". The user is logged in as "mvera", with "Login" and "Logout" buttons. The page title is "Action List", and there are "preferences", "refresh", and "filter" buttons at the bottom right.

# Search for docs ENROUTE (pending approval)

PORTICO at UPRM Researcher Unit Central Admin Maintenance System Admin 5.1.1 UPRM 05Nov13 (MySQL)

action list doc search Logged in User: mvera Login Logout

Action List

Action List | Outbox

1 items retrieved, displaying all items.

Doc: 3533

Document ID for access to VIEWING Proposal

	<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
<a href="#">show</a>	3504	Proposal Development Document	Health, Science and; Proposal No: 67; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:07 AM 10/15/2013		
<a href="#">show</a>	3533	Proposal Development Document	Health, Science an; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		10:59 AM 10/17/2013		
<a href="#">show</a>	3718	Proposal Development Document	Health, Science and; Proposal No: 137; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:05 AM 10/29/2013		
<a href="#">show</a>	3480	Proposal Development Document	TESTING SUBAWARD EN; Proposal No: 61; PI: null; Sponsor: HHS - National Institutes Of Health; Due Date: null	SAVED	COMPLETE		03:12 PM 10/14/2013		
<a href="#">show</a>	3488	Proposal Log	New Proposal Log - TESTING PROP LOG	SAVED	COMPLETE		04:34 PM		

	<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
<a href="#">show</a>	3504	Proposal Development Document	Health, Science and; Proposal No: 67; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:07 AM 10/15/2013		
<a href="#">show</a>	3533	Proposal Development Document	Health, Science an; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		10:59 AM 10/17/2013		



# Search for docs ENROUTE

## Action List

PORTICO at UPRM Research

5.1.1 UPRM 05Nov13 (MySQL)

action list doc search

Logged in User: mvera Login Logout

preferences refresh filter

Action List | Outbox

1 items retrieved, displaying all items.

	<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
<a href="#">show</a>	3504	Proposal Development Document	Health, Science and; Proposal No: 67; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:07 AM 10/15/2013		
<a href="#">show</a>	3533	Proposal Development Document	Health, Science and; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		10:59 AM 10/17/2013		
<a href="#">show</a>	3718	Proposal Development Document	Health, Science and; Proposal No: 137; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:05 AM 10/29/2013		
<a href="#">show</a>	3480	Proposal Development Document	TESTING SUBAWARD EN; Proposal No: 61; PI: null; Sponsor: HHS - National Institutes Of Health; Due Date: null	SAVED	COMPLETE		03:12 PM 10/14/2013		
	3488	Proposal Log	New ProposalLog - TESTING PROP LOG	SAVED	COMPLETE		04:34 PM 10/14/2013		
<a href="#">show</a>	3487	Proposal Development Document	XXXX; Proposal No: 62; PI: null; Sponsor: HHS - National Institutes Of Health; Due Date: null	SAVED	COMPLETE		04:32 PM 10/14/2013		
<a href="#">show</a>	3577	Proposal Development Document	Health, Science and; Proposal No: 97; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	SAVED	COMPLETE		11:02 AM 10/24/2013		
<a href="#">show</a>	3559	Proposal Development Document	Testing Workflow; Proposal No: 92; PI: null; Sponsor: HHS - National Institutes Of Health; Due Date: null	SAVED	COMPLETE		02:51 PM 10/14/2013		

Doc: 3533

	<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
<a href="#">show</a>	3504	Proposal Development Document	Health, Science and; Proposal No: 67; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		11:07 AM 10/15/2013		
<a href="#">show</a>	3533	Proposal Development Document	Health, Science and; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		10:59 AM 10/17/2013		

Doc Id

Route Status

Action Requested

Browser tabs: Envienme otra propuesta - mveracol..., Kuali Portal Index, Kuali :: Proposal Development Docu...

URL: https://kualitraining.uprm.edu/kc-ptd/proposalDevelopmentProposal.do?methodToCall=docHandler&docId=3533&command=displayActionListView#topOfForm

Proposal Development Document

Doc Nbr:	3533	Status:	Approval Pending
Initiator:	aa@uprm.edu	Created:	10:59 AM 10/17/2013
Sponsor Name:	HHS - National Institutes Of Health	PI:	MARISOL VERA COLON

Navigation tabs: Proposal, S25, Key Personnel, Special Review, Custom Data, Abstracts and Attachments, **Questions**, Budget Versions, Permissions, Proposal Summary, Proposal Actions, Medusa

## Institutional Commitment Questions

expand all collapse all \* required field

Proposal Summary hide

Proposal Information			
Title	Health, Science and Technology		Proposal Number: 83
Principal Investigator	MARISOL VERA COLON	Project Start Date	08/15/2014
Lead Unit	RU-RU - UNIVERSITY OF PUERTO RICO MAYAGUEZ	Project End Date	08/14/2016
Activity Type	Research	Include Subaward(s)?	No
Sponsor:		HHS - National Institutes Of Health	
Sponsor Deadline Date:		11/15/2013	
Sponsor Deadline Type:			

Budget Totals						
Total Direct Cost:	Total F&A Costs:	Total Cost:	Cost Share:	Underrecovery:	Program Income:	F&A Rate Type:
\$ 289,285.18	\$ 94,642.60	\$ 383,927.78	\$ 0.00	\$ 0.00	\$ 0.00	MTDC

- Budget Summary show
- Key Personnel (1) show
- Custom Data Information show
- Questions show
- Attachments show
- Keywords (1) show
- Validations show
- Print show

## Institutional Commitment Questions

Approval signifies that the proposed project fits within the academic framework and resources of the unit, requirements for new or renovated facilities space have been discussed with the appropriate people, contributions listed will be met by the department/college unless otherwise approved, that Conflict of Interest requirements have been addressed, and that Sponsored Programs may process the proposal

approve disapprove revise



Grants.gov S2S Questionnaire hide

Questions hide

UPRM Commitment of Institutional Resources (Complete) hide

Questions hide print

Does this proposal involves institutional commitment of FUNDS? (e.g. cost share/matching funds, service/maintenance contracts) If Cost Sharing applies, please specify if it is Mandatory, Voluntary committed or Voluntary uncommitted. More Information...

Yes

If YES, briefly explain the commitment type and details to allow for its proper evaluation. More Information...

It requires cost sharing of 50% of a new hire.

Does this proposal involve institutional commitment of PERSONNEL? (e.g. release time, new hire, support personnel) More Information...

Yes

If YES, briefly explain the commitment type and details to allow for its proper evaluation. More Information...

Hiring of 1 new staff.

Does this proposal involve institutional commitment of SPACE (e.g. office, laboratory, other)? More Information...

No

Does this proposal involve institutional commitment of EQUIPMENT? (e.g. Additional accessories, parts, etc) More Information...

No

close recall

## UPRM Commitment of Institutional Resources

### Yes, No, N/A

- Does this proposal involves **institutional commitment of FUNDS?**
- ..... **institutional commitment of PERSONNEL?**
- .....**institutional commitment of SPACE?**
- .....**institutional commitment of EQUIPMENT?**

If YES, briefly explain

# Action List/ **Outbox**



3 items retrieved, displaying all items.

	<u><b>Id</b></u>	<u><b>Type</b></u>	<u><b>Title</b></u>	<u><b>Route Status</b></u>	<u><b>Action Requested</b></u>	<u><b>Delegator</b></u>	<u><b>Date Created</b></u>	<u><b>Group Request</b></u>	<u><b>Delete Item</b></u>	<u><b>Log</b></u>
show	<u>3533</u>	Proposal Development Document	Health, Science an; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	ENROUTE	APPROVE		10:59 AM 10/17/2013			

- After Approval, the Document is eliminated from the Action List and will show up in the **Outbox**.
- The Status will indicate **ENROUTE**, and pending other **APPROVALS** in the Action Requested, if required...
- Date and time of the approval will be recorded and saved for future reference.



Access to Request Support ticketing center.

Support Request

5.1.1 UPRM 17Jan14 (MySQL)

action list doc search

Logged in User: mvera

Logout

Route Log

refresh

ID: 3533

hide

Title	Health, Science an; Proposal No: 83; PI: MARISOL VERA COLON; Sponsor: HHS - National Institutes Of Health; Due Date: 11/15/2013	
Type	Proposal Development Document	Created
Initiator	<a href="#">ALBINO SALDANA, EVELYN</a>	Last Modified
Route Status	ENROUTE	Last Approved
Document Status		Document Status Modified
Node(s)	DepartmentRouting	Finalized

Future Action Requests – Shows who are the next approvers. If you detect an error, please report it immediately. You may use the Support Request ‘online help desk ticketing system’ above.

Actions Taken

hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	<a href="#">ALBINO SALDANA, EVELYN</a>		11:03 AM 10/17/2013	
<a href="#">show</a>	COMPLETED	<a href="#">ALBINO SALDANA, EVELYN</a>		08:02 PM 11/05/2013	
<a href="#">show</a>	APPROVED	<a href="#">ALBINO SALDANA, EVELYN</a>		08:03 PM 11/05/2013	
<a href="#">show</a>	APPROVED	<a href="#">VERA COLON, MARISOL</a>		10:44 PM 11/05/2013	

Pending Action Requests

hide

	Action	Requested Of	Time/Date	Annotation
<a href="#">show</a>	IN ACTION LIST APPROVE	<a href="#">PADILLA VARGAS, IVELISSE</a> (DEPARTMENT HEAD; DEPARTMENT OF CHEMISTRY) <a href="#">VIETA, RENE S.</a> (DEPARTMENT HEAD; DEPARTMENT OF CHEMISTRY)	10:44 PM 11/05/2013	DEPARTMENT HEAD ASSISTANTS: IVELISSE PADILLA VARGAS

Future Action Requests

hide

	Action	Requested Of	Time/Date	Annotation
<a href="#">show</a>	PENDING APPROVE	<a href="#">VALDES PIZZINI, MANUEL</a> (DEAN OF COLLEGE; COLLEGE OF ARTS AND SCIENCES) <a href="#">FERNANDEZ, FELIX</a> (DEAN OF COLLEGE; COLLEGE OF ARTS AND SCIENCES)	10:52 PM 11/05/2013	DEAN OF COLLEGE ASSISTANTS: FELIX FERNANDEZ
<a href="#">show</a>	PENDING APPROVE	OSP Superuser	10:52 PM 11/05/2013	KC-WKFLW OSPApprover