

Instructions for Approving/Disapproving a Sponsored Project Account Creation in Kuali Research

1. You will receive an email from the Kuali Research (KR) system similar to the one below.

Kuali Research Action - Award - APPROVE - Title: Budget Demo for SIUE

siueresearch@siue.edu

Please complete the APPROVE action in Award for "Budget Demo for SIUE"

Your timely action is requested.

Failure to act when an approval is requested will stop routing.

To review the requested action: [Document #6963](https://siue-sbx.kuali.co/res/awardHome.do?methodToCall=docHandler&docId=6963&command=displayActionListView)<https://siue-sbx.kuali.co/res/awardHome.do?methodToCall=docHandler&docId=6963&command=displayActionListView>

Or, to see all actions requested: [Action List](#)

<https://siue-sbx.kuali.co/res/kew/ActionList.do>, and then click on the numeric Document ID: 6963 in the first column of the List.

2. Click on the first link (e.g., [Document #6963](#)) or copy and paste the url in a browser, which will open the award document. On this screen, you can see the account number as well as PI and basic project information.

If you want to see the full proposal associated with this award, click the Medusa tab. In that tab, click the line "Development Proposal #" and then "Open Proposal."

- Expand "Funding Proposals" to view the PI, lead unit, sponsor, start and end dates, and total proposed budget.
- Expand "Time and Money" (below, not shown) to view the awarded amount.

| Transaction Type: | Notice Date: | Comments: |
|-----------------------|--------------|-----------|
| Account Setup Request | | |

| Institution | |
|-----------------------------------|---|
| Award ID: 000047-00001 | Lead Unit ID: 161656A - Applied Dental Medicine |
| Version: 4 | Account Type: |
| Award Status: Active | Activity Type: Research - Basic |
| Account ID: 761111 | Award Type: Grant |
| Award Title: Budget Demo for SIUE | |

Instructions for Approving/Disapproving a Sponsored Project Account Creation in Quali Research

3. If you disapprove of the account creation, call Tammy Smart at x5364. Take no other actions until you are instructed to do so.
4. To approve the account creation, click the “Award Action” tab.

The screenshot shows the 'KC Award' interface. At the top right, there is a header with the following information: PI: Susan M. Morgan, Document ID: Status: 6943 FINAL, Lead Unit: Applied Dental Medicine, Award ID: Account: 000047-00001:761111, Sponsor Name: National Science Foundation, Last Update: 07/09/18 by jichram. Below the header is a navigation menu with tabs: Award, Contacts, Commitments, Budget Versions, Payment, Reports & Terms, Special Review, Custom Data, Comments, Notes & Attachments, Award Actions, and Medusa. A red arrow points to the 'Award Actions' tab. The main content area shows a 'Document Overview' section with a description: 'Adding Award'. Below this is a 'Details and Dates' section with a 'Current Action' table. The table has columns for Transaction Type, Notice Date, and Comments. The first row shows 'Account Setup Request'. Below the table is an 'Institution' section with a grid of details: Award ID: 000047-00001, Version: 4, Award Status: Active, Account ID: 761111, Award Title: Budget Demo for SIUE, Lead Unit ID: 161656A - Applied Dental Medicine, Account Type, Activity Type: Research - Basic, and Award Type: Grant.

5. To view who is in the approval process, you can expand the route log by clicking the “show” button.
 - a. To approve, click the “approve” button at the bottom of the screen. Then click the “close” button.
 - b. If you inadvertently click the “disapprove” button, contact Tammy Smart at x5364. She will have to recreate the account creation request as this action will delete the request.

The screenshot shows the 'KC Award' interface for a different award. The header information is: PI: Anita Joy, Document ID: Status: 8281:ENROUTE, Lead Unit: Dental Medicine, School of, Award ID: Account: 000023-00001:767276, Sponsor Name: American Association for Dental Research, Last Update: 07/24/18 by thornbe. The navigation menu includes: Award, Contacts, Commitments, Budget Versions, Payment, Reports & Terms, Special Review, Custom Data, Comments, Notes & Attachments, Award Actions, and Medusa. A message states 'Document was successfully reloaded.' Below this is a 'Route Log' section with a 'show' button highlighted by a red arrow. At the bottom of the page, there is a row of buttons: 'send notification', 'send ad hoc request', 'approve', 'disapprove', and 'close'. The 'approve' and 'close' buttons are highlighted with red arrows.