

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

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

### Kualu Research Action - Award - APPROVE - Title: Budget Demo for SIUE

[siueresearch@siue.edu](mailto: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.

The screenshot shows the Kuali Award system interface. At the top, there is a navigation bar with tabs: Award, Contacts, Commitments, Budget Versions, Payment, Reports & Terms, Special Review, Custom Data, Comments, Notes & Actions, and Medusa. A red arrow points to the Medusa tab. Below the navigation bar, there is a "Document Overview" section with a "hide" button. Under "Document Overview", there are fields for Description, Organization Document Number, Funding Proposals (with a "show" button and a red arrow), and Details & Dates (with a "hide" button). Below this is the "Details and Dates" section, which includes a "Current Action" table with columns for Transaction Type, Notice Date, and Comments. The "Institution" section displays various award details: 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, and Award Title: Budget Demo for SIUE. A red arrow points to the Account ID field. A text box on the right side of the screenshot contains the instruction: "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.'". A text box in the center of the screenshot contains two bullet points: "• Expand 'Funding Proposals' to view the PI, lead unit, sponsor, start and end dates, and total proposed budget." and "• Expand 'Time and Money' (below, not shown) to view the awarded amount."

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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 Kuali Award system interface. The browser address bar indicates the URL: <https://siue-sbc.kuali.co/res/awardHome.do?methodToCall=doHandler&docId=6963&command=displayActionListView#topOff/cm>. The page title is "KC Award". The navigation menu includes: 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 "Document Overview" with a description "Adding Award" and "Organization Document Number:". Below this is the "Details and Dates" section, which includes "Current Action" (Transaction Type: Notice Date: Account Setup Request) and "Institution" 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: Research - Basic, 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 Kuali Award system interface for a different award. The browser address bar indicates the URL: <https://siue-sbc.kuali.co/res/awardHome.do?methodToCall=doHandler&docId=6963&command=displayActionListView#topOff/cm>. The page title is "KC Award". The navigation menu includes: Award, Contacts, Commitments, Budget Versions, Payment, Reports & Terms, Special Review, Custom Data, Comments, Notes & Attachments, Award Actions, and Medusa. The main content area shows "Document was successfully reloaded." and "Data Validation" section with a "show" button. Below this is the "Route Log" section with a "show" button. A red arrow points to the "show" button. At the bottom of the screen, there is a navigation bar with buttons: send notification, send ad hoc request, approve, disapprove, and close. A red arrow points to the "approve" button.