Kuali Research: Finding Your Proposal

This document explains the different ways you can find your Proposals in Kuali Research, as they move through various stages of review and approval.

Once you have created and saved a proposal, it is assigned a number and will display in your Dashboard.

Once the proposal is approved, it is no longer visible on your Dashboard. You can find it in one of two places:

- 1. **Proposal Development** → **All My Proposals.** You can scroll through the proposals until you find the one you're looking for.
- 2. **Proposal Development** → **Search Proposals.** If you know the number of the proposal you're looking for, enter it in the field:



Alternatively, you can leave this field blank, and click **Search**. The results display all proposals, which is the same view as **All My Proposals**.

In both the **All My Proposals** and the **Search Proposals** views, all proposals you have submitted display, including the ones that have an **Approved** status. For approved proposals, click on **Medusa**:

		Proposal		
Actions	Proposal Number	Document Number	Proposâl Type	Proposal State
view copy medusa	271	107037	a. New	Approved and Submitted

to see the **Institutional Proposal** that was created when it was approved:

Medusa					
Filter:	Preferred Module: ● Proposal > Award ○ Award				
Institutional Proposal 00247464	Generated by Dev Proposal 271				
Development Proposal 271	Collaborating with ; Proposal No: 271; PI: Canada ; Due Date: 06/20/2024				

From both the **Proposal Development** views, or the **Institutional Proposal** view, you can click into the original proposal, and in **View Route Log**, you can see the names and dates of all the reviewers and approvers.

Funding Program	Si	aved		Routing		
Key Personnel						
Internal (sig sheet) Budget	Assigned approver Lagur	na Galvez, An	drea (alagunag@:	stu.ca) added by La	iguna Galvez, Andi	rea
Juestionnaire	Proposal Summary	Personnel	Questionnaire	Compliance	Attachments	Fundin
npliance	Proposal Sumr	nary				
monto	Title	C	ollaborating with S	South Asian Commu	inities to Enhance	Substance
iments	Principal Investigator					
ry/Submit	Lead Unit	40	010 - Faculty of H	ealth Sciences		
	Proposal Type	a.	New			
ons History	Activity Type	Fu	unded - Research			
,	Proposal Number	27	71			
	Project Start Date	10	0/01/2024			
	Project End Date	09	9/30/2025			
	Include Subaward(s)?	N	0			
	Sponsor Name	S	Social Sciences & Humanities Research Council of Canada			
	Prime Sponsor Name					
	Sponsor Deadline Date	06	6/20/2024			
	Sponsor Deadline Type	S	ponsor Deadline			

SIMON FRASER

CEL

NOTE: The **All My Proposals** and **Search Proposals** views show proposals you have created in Kuali Research, which became active on March 20, 2024.

If you are looking for a proposal you submitted before that date, you can find it in **Institutional Proposals** → **Search Institutional Proposals**.

Institutional Proposal
Create Institutional Proposal
Create Proposal Log
Search Institutional Proposals
Search Proposal Logs

In this screen, if you know the proposal number, you must add an asterisk to the number for the result to display:

|--|

If you don't know the proposal number, it helps to enter some search parameters to narrow the search results, as all records from **1996** to **March 20, 2024** were migrated over.



From the **Proposal Type** drop-down menu, if you choose **New**, you will see <u>only</u> proposals you submitted in Kuali Research.

If you choose the **Migrated/Legacy (do not use)** option, this shows proposals that were migrated over from the legacy system, Grant Track.

Institutional Proposal Number:	
Proposal Development Number:	
Proposal Type:	select 🗸 🗸 🔍
Status:	select 3 🗊
Account ID:	b. NOI/LOI d. Resubmission
Project Title:	e. Revision f. Continuation
Unit ID:	x. Migrated / Legacy (do not use)

You can also include a date range to further narrow the results:

Proposal Create Date From:	B
Proposal Create Date To:	

Click **Search** to display all your approved Proposals that were turned into Institutional Proposals. You can export your results for tracking and performance purposes:

Kuali Research							
open	medusa	00021419	/ Legacy (do not use)	Migrated / Legacy	Denied	2130	Engine
open	medusa	00026540	x. Migrated / Legacy (do not use)	Migrated / Legacy	Approved	2130	Engine Scienc
xport options: CSV spreadsheet XML							