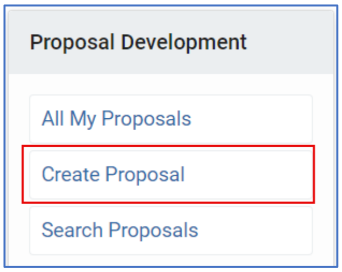
Kuali Research: Creating a Proposal for a SSHRC Small Grant

This document details the process of submitting a proposal for a SSHRC Small grant.

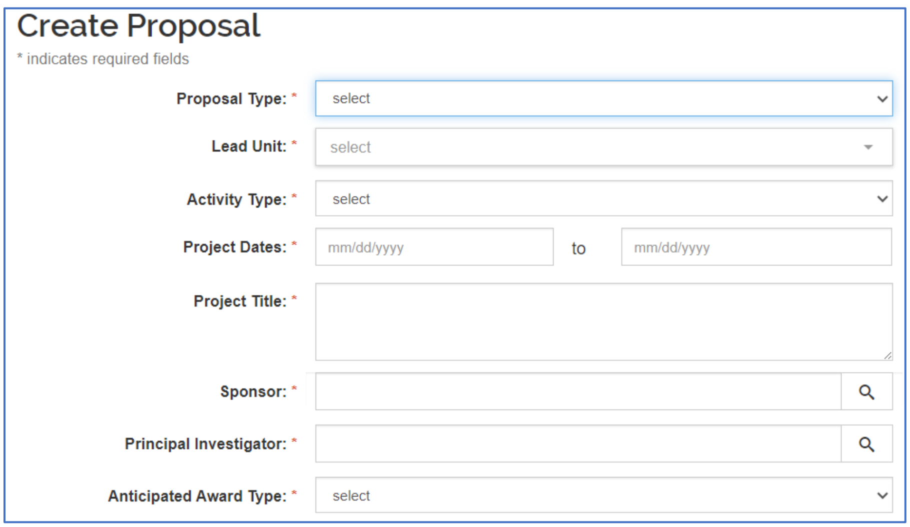
NOTE: The SSHRC Small application has two parts. One is the proposal submission in Kuali; the other is the proposal submission in the InfoReady portal. These parts can and should be done simultaneously. This document provides the Kuali instructions only.

Access Kuali by navigating to sfu.kuali.co. To access Kuali Research, click the **Research Home** card.

Under **Common Tasks**, under the **Proposal Development** group, click **Create Proposal:**



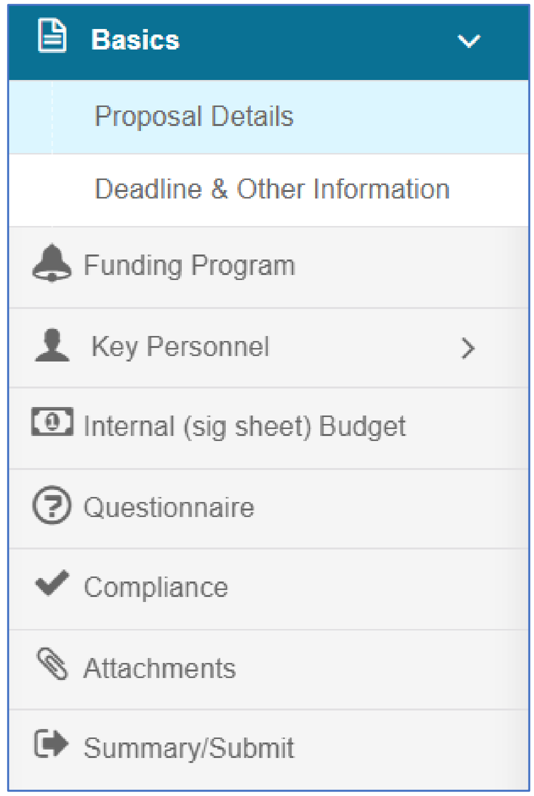
On the **Create Proposal** page, complete all fields marked with a red asterisk:



- In the **Proposal Type** field, click the drop-down and choose **New**
- In the **Lead Unit** field, type in the name of your department and select it when it displays in the drop-down list. Once you have saved the proposal, this field cannot be edited. The list you can see in the drop-down menu is the back-office view of SFU's dept structure. If you're in a non-departmentalized faculty, see the help file to find the correct code.
- In the **Activity Type** field, click the drop-down and choose **Funded - Research**
- In the **Project Dates** fields enter the start and end dates for the project.
- In the **Project Title** field, enter or copy the title of the proposal you are submitting
- In the **Sponsor** field, enter **SFU Vice President Research** (NOTE: While this is a SSHRC Small grant, the funds are allocated and distributed by SFU)
- In the **Principal Investigator** field, click the magnifying glass icon; typically, it's easiest to enter the last name and search/select the person you're looking for.
- In the **Anticipated Award Type** field, choose **G-Grant**.

After all fields are completed, click **Save & Continue**. If any fields are blank, an error message displays and you need to complete the field to be able to save the proposal.

After you save the information, your proposal now has a number. You can use this number to search for the proposal and track its progress.



After you have saved the proposal, the next page displays a menu on the left; you need to enter the required information in each section to ensure the proposal is complete.

NOTE: Click **Save and Continue** after completing each section.

1. The **Proposal Details** page is a summary of information you've just entered. Any field except **Lead Unit** can be edited up to the submission of the proposal. Leave the **Prime Sponsor Code** field blank.
2. In the **Deadline & Other Information** section, from the **Deadline Type** drop-down, choose **Sponsor Deadline**.

   In the **Deadline** field, enter the deadline for the competition; there are two annual SSHRC Small competitions. The Spring deadline is June 1 and the Fall deadline is Dec 15. If the date falls on a weekend, the following business day is used.

   You can find the specific deadline in this link.

   The **Anticipated award type** field is populated from your earlier entry.
3. In the **Funding Program** section, enter **SSHRC Small**.
4. The **Key Personnel** section is populated with the PI information you already entered. If you are the only PI, there is nothing more do to in this tab. If you have a co-investigator from SFU who has promised you a resource to be used in your project, enter their name, related information, and choose a role for them.
5. In the **Internal (sig sheet) Budget** section you only need to enter high level information about your budget; you will add your detailed budget later in the **Attachments** tab, so you do not need to recreate it here.

   Click **Add Budget** and enter a name for the budget. Click the **Start internal approval budget** radio button, and click **Create Budget**.

   In the table, the only column you need to complete is the **Direct Cost.** Enter the amount you are requesting.

   Do not enter anything in any other column. In this section, only focus on the **Periods & Totals** table, and ignore all other tabs on this page. When finished, click **Complete Budget**.

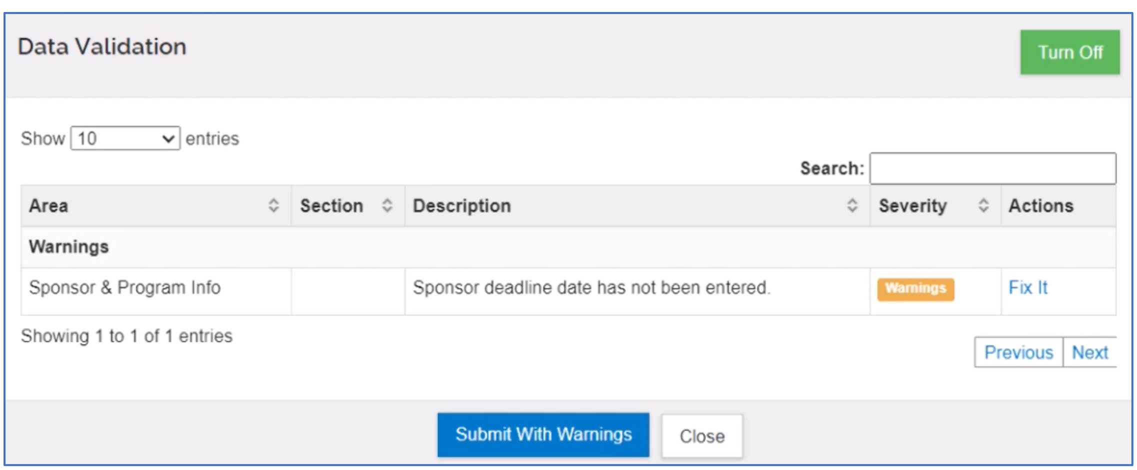
   A pop-up displays asking if the budget is complete and if you want to submit it to the sponsor; note, this is fixed language in the system; you are just submitting it to the internal workflow. Check the box and click **OK**. Click **Close** or **Return to Proposal**. The budget line is green when it is ready for approval.

6. In the **Questionnaire** section, respond to each of the questions; if you want more information about a field, click the info icon.
   - Question 1: choose **Yes**, as the funding you are requesting is in Canadian currency.
   - Question 2: regarding PI fees, choose **No**.
   - Question 3: regarding release time stipends, choose **No**.
   - Question 4: choose **Yes** to indicate SFU's overhead policy is being followed.
   - Question 5: regarding requiring additional resources, choose **No**.
   - Question 6: regarding an SFU support letter or promise of contribution by the OVPRI, choose **No**.
   - Question 7: regarding international collaboration, choose **No.**
   - Question 8: regarding work being done on SFU premises, choose **Yes**,
   - Question 9: if you are not working with indigenous peoples, cultures, or knowledge systems, choose **No**. Otherwise click **Yes** and respond to the related questions.
   - Question 10: regarding including use of any SFU core facilities, choose **No**.
   - Question 11: regarding co-applicants, choose **Yes** or **No** as appropriate.
7. In the **Compliance** section, indicate what compliance is required for your project; NOTE: completion is not necessary until the actual research begins.

   If you have no compliance requirements, you need to state this explicitly, as this is a required field. Click **Add compliance entry**, and from the **Type** drop-down list, choose **None**. In the **Approval Statu**s field, choose **Not Applicable**, and click **Add Entry**.
8. In the **Attachments** section, you need to upload your **Sponsor Budget** and **Sponsor Proposal** documents; you can do this as two different attachments or as one combined document (**Sponsor Combined Proposal & Budget**). Click **Add** to upload an attachment. In the dialog, choose the **Type**, select the **Status**, add a **Description** if needed, and click **Choose File** to navigate to where the file is saved.

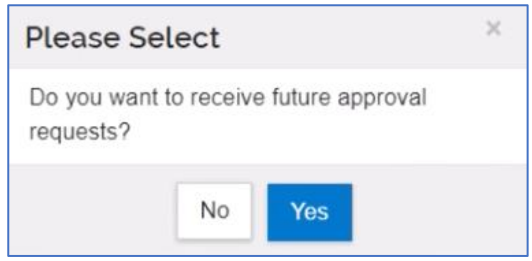
   The documents must have enough information for your Chair or Dean to make their decision.
9. The final tab is **Summary/Submit**. On this tab you can do a final review of all the information you have entered on any of the preceding tabs and make edits changes as needed. Once you have reviewed everything, click **Submit for Review**.

   If there are any errors or warnings, they will display in the data validation screen. Errors must be fixed before the final submission, but you can submit with warnings.



10. On the next screen, if you are the named PI, click **NO** on the dialog asking if you would like to receive future approval requests.

    If you say yes, you will immediately have to approve the proposal before it moves to anyone else in the queue.



Your proposal will now be routed for review and approval. If you want to check the status of your proposal, you can click **View Route Log** at any time.