



Starting a New Proposal in Kuali Coeus:

1. Log in to the Kuali Coeus Home Page using your upr.edu username and password.
2. Click on the **Researcher** tab, if necessary. On the Upper Left side of the screen, select **Create Proposal**.

The screenshot shows the Kuali Coeus interface for a Researcher. The top navigation bar includes tabs for 'Researcher', 'Unit', 'Central Admin', 'Maintenance', and 'System Admin'. The 'Researcher' tab is selected. Below the navigation bar, there are links for 'action list' and 'doc search'. The main content area is divided into two columns. The left column is titled 'Proposals' and contains a list of links: 'Create Proposal', 'Proposals Enroute', 'All My Proposals', and 'Create Proposal For Grants.gov Opportunity'. The 'Create Proposal' link is highlighted with a green arrow. Below this list are 'Lists' links: 'Search Proposals', 'Search Proposal Log', and 'Search Institutional Proposals'. The right column is titled 'IRB Protocols' and contains 'Actions' links: 'Create IRB Protocol', 'Amend or Renew IRB Protocol', 'Notify IRB on a Protocol', and 'Request a Status Change on a IRB Protocol'. Below these are 'Lists' links: 'Pending Protocols', 'Protocols Pending PI Action', 'Protocols Pending Committee Action', and 'Protocols Under Development'.

3. A Proposal Development Document will be created.

- Note the field **Doc NBR** which shows the given document identification number. The field **Initiator** shows the username of the document creator.

The screenshot shows the 'Proposal Development Document' form in the Kuali Coeus interface. The top navigation bar is the same as in the previous screenshot. The 'Logged in User: rafaelloruiz' is displayed in the top right corner. Below the navigation bar, there are links for 'action list' and 'doc search'. The main content area is titled 'Proposal Development Document'. A table displays document information:

Doc Nbr:	3396	Status:	In Progress
Initiator:	rafaelloruiz	Created:	03:31 PM 09/03/2013
Sponsor Name:		PI:	

Below the table, there are several tabs: 'Proposal', 'S2S', 'Key Personnel', 'Special Review', 'Custom Data', 'Abstracts and Attachments', 'Questions', 'Budget Versions', 'Permissions', and 'Proposal Summary'. The 'Proposal' tab is selected. Below the tabs, there are 'expand all' and 'collapse all' buttons. The 'expand all' button is highlighted with a green arrow. Below the buttons, there are several sections with 'show' buttons: 'Required Fields for Saving Document', 'Sponsor & Program Information', 'Organization/Location', 'Delivery Info', and 'Keywords'. At the bottom of the form, there are 'save' and 'close' buttons.

4. On the screen you will see several folder-like Tabs. Click the **Expand All** Button to view all of the fields. Next to it, you will find the **Collapse All** button, which hides all of the fields. You

may show or hide the fields of individual Tabs by pressing the **show** or **hide** button on each tab.

The screenshot shows the 'Proposal Development Document' form. At the top, there are navigation tabs: Researcher, Unit, Central Admin, Maintenance, and System Admin. The user is logged in as 'rafaeloruiz'. The form includes a header with 'Kuali Coeus PORTICO at UPRM' and a 'Provide Feedback' link. Below the header, there are search and action buttons. The main content area is titled 'Proposal Development Document' and contains a metadata table with fields like Doc Nbr, Status, Initiator, and Created. Below this is a tabbed interface with options like Proposal, S25, Key Personnel, etc. The 'Required Fields for Saving Document' section is expanded, showing fields for Proposal Number, Proposal Type (a dropdown menu), Lead Unit, Activity Type (a dropdown menu), Project Title, Sponsor Code, Project Start Date, and Project End Date. Green arrows point to the Proposal Type, Activity Type, Project Title, and Sponsor Code fields. Below this is the 'Institutional Fields Conditionally Required' section, which includes Award ID and Original Institutional Proposal ID fields.

5. You will need to fill the following fields:

- **Proposal Type** – use the drop down box. For most new proposals the type will be **New**. For more information, ask the External Resources Office of the R&D Center
- **Activity Type** – use the drop down box to select; for most proposals, the type will be **research**
- **Project Title** – enter the title
- **Sponsor Code** – you may enter it or use the drop down box to search
 - To search for a sponsor code, click on the magnifying glass to the right of the blank **Sponsor Code** field. The **Sponsor Lookup** Screen will appear:

The screenshot shows the 'Sponsor Lookup' form. It features a header with 'Kuali Coeus PORTICO at UPRM' and a 'Provide Feedback' link. The user is logged in as 'rafaeloruiz'. The form contains several input fields for sponsor information: Sponsor Code, Sponsor Name, Acronym, Sponsor Type Code (with a dropdown and search icon), DUN And Bradstreet Number, DUNS Plus Four Number, DODAC Number, CAGE Number, Postal Code, State (with a dropdown), Country Code (with a dropdown), Audit Report Sent For Fy, Owned By Unit (with a search icon), and Address Book Id (with a search icon). At the bottom of the form, there are three buttons: 'search', 'clear', and 'cancel'. A note '* required field' is visible in the top right corner of the form area.

- To Search for a code, enter the Sponsor Name or Acronym in the corresponding field, then click on the **Search** button below. Items retrieved will appear at the bottom of the screen.
- You may also use a wildcard to search by writing a word between asterisks. For example, enter *Energy* in the **Sponsor Name** and click on the **Search** button. Several options will appear, such as the Department of Energy and others
- When you find the right sponsor, click on the **Return Value** button to it's left. You will be returned to the previous screen and the corresponding **Sponsor Code** will appear in it:

Sponsor Lookup * required field

4 items retrieved, displaying all items.

Return Value	Sponsor Code	Sponsor Name	Acronym	Sponsor Type	DUN And Bradstreet Number	DODAC Number	CAGE Number	State	Country Code
return value	CID027	Ciris Energy, Inc.	CEI	Private Profit					
return value	CID049	Department Of Energy	DOE	Federal					
return value	CID092	DOI - Bureau Of Ocean Energy Management	DOI - BOEM	Federal					
return value	CID101	DOI - The Bureau Of Ocean Energy Management, Regulation, And Enforceme...	DOI - BOEM	Federal					

- **Project Start Date and Project End Date** -the format is MM/DD/YYYY. You may click on the calendar icon next to each and select the date. To change months, click on the “<” and “>” icons. To change years, click on the “<<” and “>>” icons. Once you have the correct month and year, click on the date to finish.
 - In the **Sponsor and Program Information Tab**, enter the **Sponsor deadline Date, Sponsor Deadline Time and Notice of Opportunity.**
 - Enter the **(Funding) Opportunity ID**, if available.
6. Click the **save** button at the bottom of the screen.

The following illustration shows the basic required fields already filled in including the Sponsor Deadline Date in the Sponsor & Program Information Tab (read below). Other fields may be required by a specific agency.

The screenshot displays a web form titled "Required Fields for Saving Document" with a "hide" button. The form is organized into several sections:

- Required Fields for Saving Document:**
 - Proposal Number: 21
 - * Proposal Type: New
 - * Lead Unit: RU-15001 - RESEARCH AND DEVELOPMENT CENTER
 - * Activity Type: Research
 - * Project Title: Development of a Lower-Cost Hybrid Car Battery
 - * Sponsor Code: CID049 (Department Of Energy)
 - * Project Start Date: 09/04/2013
 - * Project End Date: 09/03/2015
- Institutional Fields Conditionally Required:**
 - Award ID: [Empty]
 - Original Institutional Proposal ID: [Empty]
- Sponsor & Program Information:**
 - Sponsor Deadline Date: 09/30/2015
 - Sponsor Deadline Time: [Empty]
 - Sponsor Deadline Type: select
 - Notice of Opportunity: select
 - Sponsor Name: Department Of Energy
 - CFDA Number: [Empty]
 - Prime Sponsor ID: [Empty]
 - Opportunity ID: [Empty]
 - NSF Science Code: select
 - Sponsor Proposal ID: [Empty]
 - Sponsor Div Code: [Empty]
 - Does this proposal include subaward(s)?: [Checked]
 - Anticipated Award Type: select
 - Sponsor Program Code: [Empty]
 - Opportunity Title: [Empty]
- Organization/Location:** [show]
- Delivery Info:** [show]
- Keywords:** [show]

At the bottom of the form, there are three buttons: "save", "reload", and "close".

7. If the proposal is a **Renewal** or **Continuation**, enter the current **Award ID**, the number assigned by Quali Coeus. This number is different from the **Sponsor Award ID**, which is the sponsor assigned grant number.
 - To find the **Award ID**, click on the magnifying glass next to the field. An **Award Lookup** screen will appear. Enter the **Sponsor Award ID** and click on **Search**. The results will appear below the search box. Click **Return Value** next to the correct **Sponsor Award ID**. The Quali Coeus **Award ID** will be returned.
8. Enter the **Original Institutional Proposal ID**, if applicable. This is required if the proposal is a resubmission of a proposal that was previously submitted through Quali Coeus.
9. Click the **save** button at the bottom of the screen.
10. In the **Sponsor & Program Information** panel, enter the **Sponsor Deadline Date**. As in the previous date entry, the format is MM/DD/YYYY. You may click on the calendar icon next

to each and select the date by clicking on it. To change months, click on the “<” and “>” icons. To change years, click on the “<<” and “>>” icons. Once you have the correct month and year, click on the date to finish.

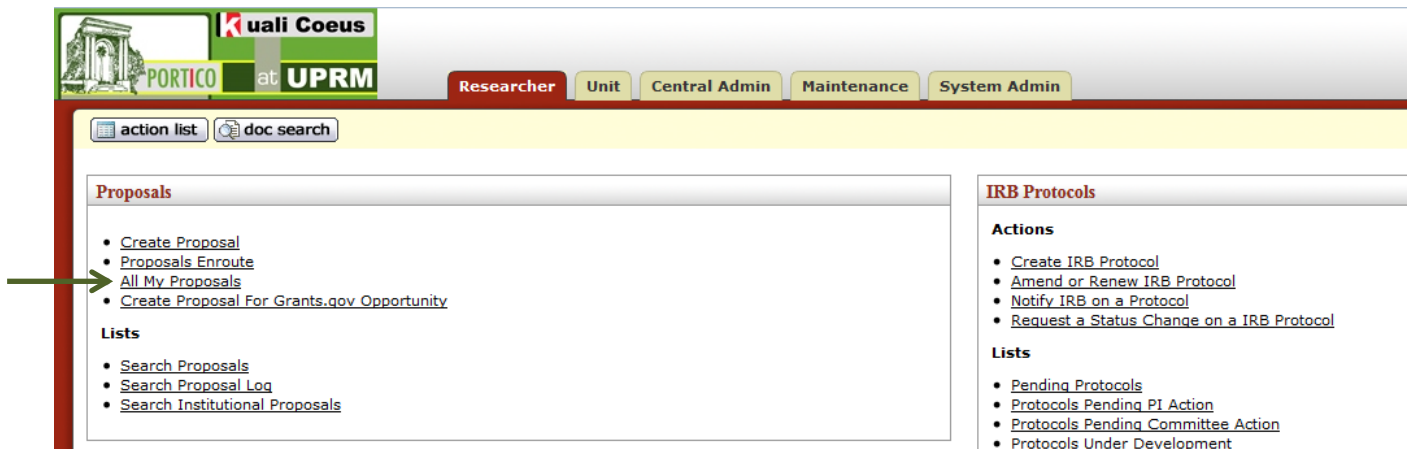
11. Click the **save** button at the bottom of the screen.

12. If you are submitting to Grants.gov or Researcher.gov:

- Click on the **S2S (System to System)** tab
- Click on **S2S Opportunity Lookup** and select Grants.gov or Researcher.gov
- Enter the Funding opportunity ID
- Click on **Search** and click on **Return Value** to select the Funding opportunity
- Click the **save** button

Retrieving a previously saved Proposal Development Document:

1. Log in to the Kualu Coeus home page.
2. On the upper left side of the screen, select **All My Proposals**



3. The **Document Search Screen** will appear. Click on the **search** button to see your Proposal Development Documents
4. Click on the Document ID field of the document you wish to retrieve. The corresponding Proposal Development Document will appear. You may edit the document.
5. Always remember to click the **save** button when you're done editing.