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| go-arrow-red | This documentation set is also available as a traditional printable manual in portable document format. To download, save, print and view it, click the following link (requires Adobe Acrobat, Apple Preview or equivalent reader software): [KC 2.0 User Guide.pdf](../KC%202.0%20User%20Guide.pdf). |

# Introduction

The Kuali Coeus (KC) research administration system is a community-source software application system developed by and for higher education institutions to serve their research administration software needs. KC delivers a means to administer your institution’s research information, improve access to research information, and enhance support for its research compliance. Based on the functionality of MIT’s Coeus system, KRA is a re-engineering effort that adheres to the Kuali Architecture and Standards while filling in missing functionality.

The application is being designed to facilitate Proposal & Budget Development, Grants.gov Integration, Institutional Review Board (IRB) / Human Subjects, Awards, Conflict of Interest, Institutional Proposal / Negotiations, Report Tracking, Subcontracts, Cost Share Commitment Tracking, Animal Care and Use, Bio-Safety Management, Subrecipient Monitoring, Export Controls / ITAR Management, and Chemical Tracking.

## About This Documentation

KC User Documentation, whether printed or in the form of in-application help, provides high-quality descriptions of how the software system interacts and performs with manual procedures in order to appropriately respond to business events. These user assistance materials are aimed at not only providing **user guides** and **online help** for implementing institutions, but also at providing **a basis for the training of new system users**. They also contain descriptions of the detailed functionality of each component of the application, and may thus serve as a reference for users who are already quite familiar with research administration and web-based software.

### Prerequisites

There are no specific prerequisites for reading this documentation. However, it will be helpful if you have the following qualifications:

* Basic familiarity with your institution’s research administration business rules and practices
* Working experience with Web-based software application systems

We recommend that you visit <http://www.kuali.org> for a general orientation, and strongly encourage you to take a “test drive” of the demonstration version of KC that is accessible from this site. It not only allows you to preview the KRA functionality, but more importantly, it gives you the opportunity to practice using the software, which helps to reinforce the concepts and skills introduced in this documentation.

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| lightbolb-small | KC User Documentation and In-Application Help is not meant to take the place of on-the-job training on your institution’s research administration policies, procedures and tasks. KC is a tool you will use to accomplish a portion of those tasks, but this documentation is not intended to train you how research administration activities happen at your institution. Although it covers enough of the very general principles of online research administration to instruct you how to use the software, it does not take into account which users with which job duties use which screens to perform which tasks – this is the responsibility of your unit or department within the organization. KC’s flexibility for configuration and customization dictates that it is the responsibility of your institution to educate you about its unique implementation of KC. |

### Types of Documentation Included

Interspersed throughout you will find the following three basic types of user documentation (typically appearing in this general-to-specific order):

* **Conceptual** documentation includes reference and overview information that is used to support user understanding. It documents guidelines that: 1) enhance the completion of a task and 2) are best maintained independently so as not to interrupt the flow of learning. It does not provide how-to instruction, is not sequential, and is often in the form of a table. It often appears as a paragraph or two at the very beginning of a topic, or sometimes at the end of a printed user guide in the form of appendices.
* **Process** documentation contains high-level overviews of process steps and flow charts. It is necessary only if the activity 1) is complex, 2) involves risk, or 3) must be performed in a consistent manner. It details sequential actions written as a series of tasks; and may involve multiple departments and/or users. This type of content usually contains overview information and business rules.
* **Task** documentation contains specific, detailed instructions with notes and action results that guide you through screen navigation to accomplish tasks. These often appear as numbered (ordered) lists of steps. It is necessary only when the use of the system involves a task that: 1) involves user input action (data entry) by a single performer, 2) is complex, 3) involves risk, 4) must be performed in a consistent manner, 5) is best documented as a separate, stand-alone topic, and/or 6) when the task detail is referenced in multiple procedures or is subject to frequent change.

### Screen Images and Test Data

Screen images (and data displayed therein) may not be technically identical to what can be viewed in the actual application, and are provided for demonstration purposes only.

### Institutional Business Processes and KC Implementation

Various components of KC modules contain functions that are configurable prior to implementation, based on individual institutional business processes. KC is delivered with a set of data elements; some of which come with pre-populated (hard-coded) values, while others are configurable by institution. These may include, but are not limited to, administrative, maintenance and control data such as restrictions, names, types, groups and codes that can be modified, removed or added to, based on your institution's unique business rules.

### Configurable Values

Many values referenced in this user documentation are in fact configurable and an institution implementing KC could choose to customize them. Wherever possible an effort has been made to make key values configurable as parameters as opposed to "hard coding" values into the application. Therefore some of the references in the user documentation to specific values for fields or attributes may in fact be different at your institution depending on the particular configuration decisions.

## Purpose and Audience

The **purpose** of this documentation is to assist you with efficient usage of the KC system by describing its features, tools and processes, including a walkthrough of:

* Screen navigation
* Action options
* Using the software to accomplish tasks
* Electronic document and workflow routing

All KC documentation, whether printed or online, is meant to demonstrate how the system works and thus serves as a helpful desk reference during day-to-day system usage. Once familiar with the basic functionality of the KC, you can use this guide as a valuable tool for less common tasks, and as an excellent source of information should you experience any difficulties.

The **audience** of this documentation is any user of the system, however, the focus is on the typical end user involved in research administration activities as opposed to those involved in installation, implementation, technical configuration, maintenance, and system administration.

The term **end user** is meant to differentiate software developers from the users of the programs they write, and similarly, for information technology professionals to distinguish the system administrator from the users of computer systems for which the administrator is responsible.

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| go-arrow-red | For highly technical KC documentation, see the online Rice documentation at <http://rice.kuali.org/documentation/1.0.0/> which includes global user guides, installation guides, database diagrams, and technical reference guides for notification, workflow, identity management, nervous system and service bus modules. |

## Organization and Conventions

This documentation employs an information architecture design and set of typographic conventions to make it simple to use. Having an understanding of the way it is organized and the conventions it uses are important to using it most efficiently.

### How The Organization Suits the Subject Matter & Corresponds to the Software Design

KC user documentation is generally organized according to the design of the user interface. Main menu tabs at the top of every screen are designed for user types, and the functionality links displayed on each are grouped according to functional subject matter areas.

The table of contents is organized according to the screens and action options in the software, allowing you to efficiently locate specific information. Typically, you will find that topics appear as they do in the user interface of the software system in a top-to-bottom, left-to-right fashion, as you would read a website or newspaper.

### Icons and Symbols

The following graphical icon symbols are used throughout this user documentation to call your attention to pieces of textual information and statements that can generally be categorized as described:

Table Icons in User Documentation

| Icon | Description |
| --- | --- |
| pencil-small | Note/Important/FYI |
| go-arrow-red | Cross-reference/Link/ Internal or External Hyperlink |
| lightbolb-small | Suggestion/Concept/Hint/Tip/Idea |
| exclaim | Caution/Warning/Error |

#### Typographic Conventions

This document adheres to specific documentation standards and style conventions to optimize readability. The formatting of text used to name “things you click on” are typically **bold** to enhance visual comprehension and improve usability.

Sequential tasks are numbered, notes and action results are indented, and user interface element references are typically formatted to enhance readability. Mouse pointer icons and callouts are used frequently to show you what to click on at each process step.

## User Support Information

Visit <http://www.kuali.org/support> for information about Kuali Commercial Affiliates.

Visit <http://www.kuali.org/kc> for general information about the Kuali Coeus project.

Visit <http://www.kuali.org> for links to FAQs, resource guides, conference information, workshops, feeds, newsletters, test drives, downloads and tutorials.

E-mail [kc.doc.collab@kuali.org](mailto:kc.doc.collab@kuali.org) to contact us with comments or suggestions for future documentation editions. As we write, revise, and evaluate our documentation, your feedback is the most valuable input we receive.



Figure Topic-Specific In-Application Help E-Mail Feedback

Click the **E-Mail** icon on the help menu bar from any screen, document or page to immediately provide feedback on a particular help topic. Your default e-mail application is launched with the 'To' and 'Subject' fields automatically populated, along with the help URL in the body of the e-mail. Just add your comments and click Send.

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# Overview

## Topic 1

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# E-Doc Fundamentals

## Topic 1

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# Proposal Development Document

## Proposal

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### Document Overview

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### Required Fields for Saving Document

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### Sponsor & Program Information

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### Organization/Location

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#### Applicant Organization

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#### Performing Organization

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#### Performance Site Locations

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#### Other Organizations

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### Delivery Info

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### Keywords

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## Grants.gov

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### Opportunity Search

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## Key Personnel

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### Person Attributes

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### Combined Credit Split

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## Special Review

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### Special Review

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## Custom Data

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### Personnel Items for Review

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### Project Details

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### Custom Attributes

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## Abstracts and Attachments

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### Proposal Attachments

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### Personnel Attachments

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### Internal Attachments

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### Abstracts

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### Notes

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## Questions

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### Grants.gov/Agency Specific Questions

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### Proposal Questions

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## Budget Versions

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### Budget Versions

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## Permissions

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### Assigned Roles

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### Users

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## Proposal Hierarchy

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### Parent

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### Child

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## Proposal Actions

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### Data Validation

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### Proposal Hierarchy

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### Print

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### Copy to New Document

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### Route Log

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### Ad Hoc Recipients

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## Medusa

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### Medusa

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# Budget Document

## Budget Versions

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## Parameters

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### Budget Overview

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### Budget Periods & Totals

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#### Budget Periods

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#### Totals

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## Rates

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### Research F & A

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### Fringe Benefits

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### Inflation

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### Vacation

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### Lab Allocation - Salaries

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### Lab Allocation - Other

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### Other

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## Summary

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### Summary

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### Personnel

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### Non-Personnel

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### Totals

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## Personnel

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### Select Budget Period

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### Project Personnel (All Periods)

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### Budget Overview (Period #)

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### Personnel Detail (Period #)

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## Non-Personnel

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### Select Budget Period

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### Budget Overview (Period #)

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### Equipment

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### Travel

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### Participant Support

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### Other Direct

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## Distribution & Income

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### Cost Sharing

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### Unrecovered F&A

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### Project Income

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#### Income Details

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#### Income Summary

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## Modular Budget

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### Select Modular Budget Period

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### Modular Budget Overview

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### Direct Cost

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### F&A

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## Budget Actions

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### Print Forms

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### Budget Justification

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### Sub Award Budget

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# KC Protocol

## Protocol

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### Document Overview

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### Required Fields for Saving Document

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### Status & Dates

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#### Status & Dates

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#### Risk Levels

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### Additional Information

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#### Additional Information

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#### Other Identifiers

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#### Area of Research

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### Organizations

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### Funding Sources

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### Participant Types

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## Personnel

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### Add Personnel

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#### Person Details

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#### Contact Information

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#### Unit Details

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## Questionnaire

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## Custom Data

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### Course Related

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## Special Review

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## Permissions

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### Assigned Roles

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### Users

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## Notes & Attachments

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### Protocol Attachments

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#### Add Protocol Attachment

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### Personnel Attachments

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#### Add Personnel Attachment

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### Notes

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## Protocol Actions

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### Request an Action

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#### Submit for Review

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#### Delete Protocol, Amendment, or Renewal

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#### Enter Risk Level

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### Data Validation

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### Print

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### Summary & History

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#### Summary

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#### View Notes

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#### History

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### Copy to New Document

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# Proposal Log

## Document Overview

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## Edit Proposal Log

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## Notes and Attachments

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## Ad Hoc Recipients

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## Route Log

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# KC Institutional Proposal

## Institutional Proposal

### Document Overview

### Institutional Proposal

### Sponsor & Program Information

### Financial

### Graduate Students

### Notes

### Delivery Info

### Keywords

## Contacts

### Project Personnel

### Unit Contacts

### Central Administration Contacts

## Custom Data

### Personnel Items for Review

### Project Details

### Custom Data

## Special Review

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## Intellectual Property Review

### Review Data

### Activities

## Distribution

### Cost Sharing

### Unrecovered F&A

## Institutional Proposal Actions

### Data Validation

### Funded Awards

### Ad Hoc Recipients

### Print

### Route Log

## Medusa

### Development Proposal

### Award

# Intellectual Property Review

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## Review Data

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## Review Activities

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## Notes and Attachments

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## Ad Hoc Recipients

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## Route Log

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# KC Award

## Award

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### Document Overview

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### Funding Proposals

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#### Add Funding Proposals

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#### Current Funding Proposals

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### Details & Dates

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#### Current Action

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#### Institution

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#### Sponsor

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#### Sponsor Funding Transferred

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#### Time & Money

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### Subawards

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#### Approved Subawards

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### Sponsor Template

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### Keywords

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## Contacts

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### Key Personnel and Credit Split

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#### Key Personnel

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#### Person Details

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#### Unit Details

Type your text here.

### Unit Contacts

Type your text here.

### Sponsor Contacts

Type your text here.

### Central Administration Contacts

Type your text here.

## Commitments

Type your text here.

### Cost Sharing

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### Rates

Type your text here.

#### F&A Rates

Type your text here.

#### Benefits Rates

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### Preaward Authorizations

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#### Sponsor Authorization

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#### Institutional Authorization

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## Budget Versions

Type your text here.

### Budget Overview

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### Budget Versions

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## Payment, Reports & Terms

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### Payments & Invoices

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#### Payment & Invoice Requirements

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#### Award Payment Schedule

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### Reports

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#### Report Classes

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#### Miscellaneous Procurement/Purchasing

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### Terms

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### Special Approval

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#### Approved Equipment

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#### Approved Foreign Travel

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### Closeout

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#### Award Closeout

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## Special Review

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#### Special Review

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## Custom Data

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### Personnel Items for Review

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### Project Details

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### Custom Data

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## Comments, Notes & Attachments

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### Comments

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### Notes

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### Attachments

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## Award Actions

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### Data Validation

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### Hierarchy Actions

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### Print

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### Ad Hoc Recipients

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### Route Log

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## Medusa

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### Summary

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### Dates & Amounts

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### Award Details Recorded

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### Investigators

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# KC Time And Money

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## Transactions

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## Direct/F&A Funds Distribution

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## Summary

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#### Summary

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#### Dates & Amounts

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#### Award Details Recorded

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#### Investigators

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## Action Summary

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## History

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## Ad Hoc Recipients

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## Route Log

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# Award Budget Document

|  |  |
| --- | --- |
| **add.jpg** | This topic has been identified as being incomplete or in need of improvement at the time of publishing. We value and welcome your input as a Kuali Coeus community member, and encourage you to scrutinize this content and improve upon it.  To contribute, click the e-mail  icon on the application help toolbar and send your documentation to [kc.doc.collab@kuali.org](mailto:kc.doc.collab@kuali.org?subject=KC%20Help). |

## Budget Versions

Type your text here.

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### Fringe Benefits

### Inflation

### Vacation

### Lab Allocation – Salaries

### Lab Allocation – Other

### Other

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### Summary

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### Totals

## Personnel

Type your text here.

### Select Budget Period

### Project Personnel (All Periods)

### Budget Overview (Period #)

### Personnel Detail (Period #)

## Non-Personnel

Type your text here.

### Select Budget Period

### Budget Overview (Period #)

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### Travel

### Participant Support

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