Overview:
Describes how to start a new Kuali Research Proposal.

Procedure:

1. From the Researcher Home screen in the Proposals group, select Create Proposal.
(The option in the Unit menu is Proposal Development.)

Note: User must have authorization for creating a proposal in the unit where proposal is being managed.

The Create Proposal window will open with six required fields for saving the Proposal Document displayed (marked with red asterisks).

Figure 1 Main Menu - Researcher

Figure 2 – Create Proposal Window
2. Complete the **Create Proposal** fields:

Enter data in the following fields: Proposal Type, Lead Unit, Activity Type, Project Dates, Project Title, and Sponsor. Here is a description of required data:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposal Type</strong></td>
<td><strong>Required</strong>. Select the appropriate type from the drop-down list.</td>
</tr>
<tr>
<td><strong>Lead Unit</strong></td>
<td><strong>Required</strong>. Select the applicable unit from the drop-down list. If your User Account has authorization for more than one unit, all of those units will be displayed in the drop-down list. If you have authorization to one unit, only that until will be displayed. <strong>Please note:</strong> After clicking the <strong>Save and Continue</strong> button, the <strong>Lead Unit</strong> field will become read only and will no longer be editable.</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td><strong>Required</strong>. Select the appropriate entry from the drop-down list.</td>
</tr>
<tr>
<td><strong>Project Dates</strong></td>
<td><strong>Required</strong>. The Project Start and End Date. Use <strong>date</strong> format or the Calendar tool that appears as you click in the fields to select the date.</td>
</tr>
<tr>
<td><strong>Project Title</strong></td>
<td><strong>Required</strong>. Enter Title (refer to the sponsor instructions). The field limit is 200-character maximum; individual sponsors may require shorter titles. <strong>Please note:</strong> For s2s submissions, there may be additional special character restrictions.</td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td><strong>Required</strong>. The organization providing funding. Start typing either the sponsor name or the specific 6-digit code, and the system will show a dropdown list of possible choices. To search for the sponsor value, click the <strong>magnifying glass</strong> to open a separate lookup window. <strong>Note</strong> – This field employs predictive typing functionality to generate suggestions.</td>
</tr>
</tbody>
</table>

Table 1 – Create Proposal Fields

**Sponsor** field should be the sponsor providing funds to Colorado State. If CSU is the subcontractor for the proposal, then the organization to which you are submitting your proposal is your **Sponsor** and the **Prime Sponsor** is the agency providing the funds to that organization.

⚠️ **Note:** If Sponsor is *not found* in the search, enter code **000000**. Then contact OSP, **Claudia.amos@colostate.edu** or **rs_kc_help@mail.colostate.edu**, to provide the
information needed to create a new sponsor in the system. The sponsor code must be corrected to a real sponsor code before the proposal can be submitted to review (routing for approvals).

Figure 3 – Create Proposal required fields

Quick Tip: start typing all of part of the sponsor name in the sponsor field, then scroll down for available sponsor name options. Example above “a” for all sponsors beginning with the letter “A”.

Figure 4 – Proposal Development Document View (Basics → Proposal Details subpanel)

3. Click the Save and Continue button.

Cancel action button will close the screen and return you to the Kuali Research Home screen with no data saved.