# Kuali Research: Submitting a VPR Travel Grant (Create Proposal)

This document details the process of submitting a VPR Travel Grant. In the Kuali system, the process is called Creating a Proposal.

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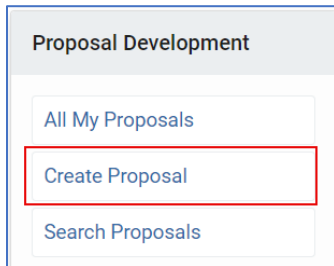
On the **Create Proposal** page, complete all fields marked with a red asterisk:

- In the **Proposal Type** field, click the drop-down and make the appropriate choice
- 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, make the appropriate choice from the drop-down list.
- In the **Project Dates** fields enter the start and end dates of your travel.
- In the **Project Title** field, enter the name and/or purpose of your travel.
- In the **Sponsor** field, type in VPR and choose **SFU Vice President Research**.
- 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, and select it.
- 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.

> Proposal Development
> # Proposal: #101
> PI: *Tessa MacKinnon*

The next page displays a menu on the left; enter the required information in each section to complete the proposal. 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. The **Deadline & Other Information** section is not required and not relevant to the travel grant. There will be a warning when you submit the proposal, but you can still submit, as this is not a required field. You do not have to enter anything in the blank fields.

   The **Anticipated award type** field is populated from your earlier entry.

3. In the **Funding Program** section, enter **VPR Travel Grant** pool 1 or 2, depending on the intake.

4. The **Key Personnel** section is populated with the PI information you already entered. No action is required in this section.

5. In the **Internal (sig sheet) Budget** section, enter only the reimbursement amount.

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

   The only column you need to complete is **Direct Cost**. Please enter your requested amount.

   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**.

> 📄 **Basics** ⌄
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> Proposal Details
>
> Deadline & Other Information
>
> 🔔 Funding Program
>
> 👤 Key Personnel ›
>
> 💠 Internal (sig sheet) Budget
>
> ⑦ Questionnaire
>
> ✔ Compliance
>
> 📎 Attachments
>
> ➡ Summary/Submit

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 reimbursement you are requesting is in CAD 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 international collaboration, choose **No**, or choose **Yes** and indicate the relevant countries from your travel.

> **Budget Questions**
> 1 - Is the above budget in CAD currency?
> ⓘ
> ◉ Yes

- Question 6: regarding work being done on SFU premises, choose **Yes**, as this question was not designed for/is not relevant to the travel grant.
- Question 7: if you are not working with indigenous peoples, cultures, or knowledge systems, choose **No**. Otherwise click **Yes** and respond to the related questions.
- Question 8: regarding requiring additional resources, choose **No**.
- Question 9: regarding including use of any SFU core facilities, choose **No**.
- Question 10: regarding co-applicants, choose **No**.
- Question 11: regarding an SFU support letter or promise of contribution by the OVPRI, choose **No**.

7. The **Compliance** section is not applicable to travel grants, but is a required field.

   Click **Add compliance entry**, and from the **Type** drop-down list, choose **None**. In the **Approval Status** field, choose **Not Applicable**, and click **Add Entry**.

8. In the **Attachments** section, due to system requirements, you need to upload your document(s) under two headings – **Sponsor Budget** and **Sponsor Proposal**, until the system is updated.

   Click **Add** to upload a single 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. If your checklist and supporting documents are in one file, there is no need to separate them; just upload the document under each document type, to satisfy the system requirements.

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 **Do you want 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.