

Overview:

This Quick Reference Card illustrates how to:

- **Search** for an Institutional Proposal
- Export results
- View Medusa

Notes:

The **Institutional Proposal** is the official MIT record of a proposal sent to a Sponsor. Unlike Development Proposals, there is no sensitive information such as budget details contained.

After the sponsor funds a proposal, a Research Administrator links the Institutional Proposal to the Award document when creating an Award. These connected records are linked via KC's **Medusa**.

Search for an Institutional Proposal:

1. On the **Home Page**, in the **Pre-Award** list section select *view more*, and click the **Search Institutional Proposals** link.

		HOME DASHBOARD SYSTEM ADMIN PORTAL
		kc6021-s18-20150423-1040 User: dgarcia - Doc Search Action List Get Help
Welcome , Dave		
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		OSP Web Site
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What would you like to do?		CITI Training
		Grants.Gov
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Pre-Award	Post-Award	Subawards
Create Proposal	Create Award	Create SubAward
Search for Proposals	Search for Award	Search for SubAward
View Proposals Enroute	View All My Awards	View ISR/SSR Reporting
View All My Proposals	view more	view more
Create Proposal Log		
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Create Proposal Log Create Institute Proposal Search for Institutional Proposals Create Negotiations Search Negotiations		

Figure 1 - Searching Institutional Proposals

This will open up the **Institutional Proposal Lookup** screen.

2. Enter the applicable search criteria into available fields and click **Search** to display the results.



Note – in Kuali Coeus, each Institute Proposal is assigned a unique, sequential 8 digit number, with the first 2 digits representing the fiscal year (FY) and the next 2 digits representing the fiscal month (FM). Users can search for all proposals in a FY by using the first 2 digits, followed by an asterisk, such as 15* (for FY2015).

Institutional Proposal Lookup 🕐	
	* required field
To Alberti and Deserved New Leve	
Institutional Proposal Number:	
Proposal Type:	New 🔻 🔍
Status:	Pending 🔹 🔍 🔍
Account ID:	
Project Title:	
Lead Unit ID:	267600 🕓 🕮
Proposal Person:	<u> </u>
Sponsor ID:	000340 🔍 💷
Sponsor Name:	
	cancel

Figure 2 - Searching in the Institutional Proposal Lookup Screen

3. From the resultant list of proposals, click **Open** to display an Institutional Proposal. This will display the official MIT record of a proposal sent to a sponsor.

Note: Right click for options to open an individual proposal in a new tab or window. This will save your results list.

Ac	tions	<u>Institutional</u> Proposal Number	<u>Proposal</u> <u>Type</u>	<u>Activity</u> <u>Type</u>	<u>Status</u>	<u>Lead</u> Unit ID	<u>Lead</u> <u>Unit</u> <u>Name</u>	Account ID	<u>Project Title</u>	<u>Sponsor</u> <u>ID</u>	<u>Sponsor</u> <u>Name</u>	<u>Prime</u> Sponsor
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ope	Open I	ink in new window		anized earch	Funded	152000	Chemiatry	6529751	Sunthesis of d- and p-Block Element Malecules, Responds, and Precursor	<u>000500</u>	<u>NSF</u>	
ope	Open I	ink in incognito window		anized earch	Funded	152000	Chemiatry	6330347	CAREER: Using chemistry to probe anthras toxin protein translocation (<u>000500</u>	<u>NSF</u>	
ope	Save li	nk as		anized earch	<u>Funded</u>	152000	Chemiatry	6929383	CAREER: Coordination Chemistry of Zinc- Chelating S100 Proteins and Bis	<u>000500</u>	<u>NSF</u>	
<u>ope</u>	соруп	ink address		anized earch	Funded	152000	Chemiatra	6330066	CAREER: Stable Carbones as Surface Anthoning Groups	000500	NSF	
ope	Inspec	t	Ctrl+Shift+	anized Research	Funded	152000	Chemiatry	6930213	Shape Persistent, Dynamic, and Liquid Crystalline Materials for Sensor	000500	NSF	

6 items retrieved, displaying all items.

Export list of Institutional Proposals:

To export resultant list of proposals, click **CSV**, **Spreadsheet**, or **XML**, as applicable.



Actions	<u>Institutional</u> Proposal Number	<u>Proposal</u> <u>Type</u>	<u>Activity</u> <u>Type</u>	<u>Status</u>	<u>Lead</u> Unit ID	<u>Lead</u> <u>Unit</u> <u>Name</u>	Account ID	
<u>open</u> medusa	14133424	Resubmission	<u>Organized</u> <u>Research</u>	<u>Funded</u>	152000	Chemiatry	6929882	ittia Boat
<u>open</u> <u>medusa</u>	14130425	<u>Resubmission</u>	<u>Organized</u> <u>Research</u>	<u>Funded</u>	152000	Chemiatry	6829751	54 1913
<u>open</u> medusa	14707021	<u>Resubmission</u>	<u>Organized</u> <u>Research</u>	<u>Funded</u>	152000	Chemiatry	6930347	CA No 4
<u>open</u> <u>medusa</u>	1400023	<u>Resubmission</u>	<u>Organized</u> <u>Research</u>	<u>Funded</u>	152000	Chemiutry	6929383	CA Ch
<u>open</u> medusa	54101020	New	<u>Organized</u> Research	<u>Funded</u>	152000	Chemiatry	6930066	(C,8) (8)11
<u>open</u> <u>medusa</u>	24252243	Resubmission	<u>Organized</u> Research	<u>Funded</u>	152000	Chemiatry	6930213	Sh

Figure 3 - Search Results, Actions, & Export Options

KC Institutional Proposal				Doc Nbr:	201732	Status:	FINAL	
				IP Num:	14051033	Last Update:	11/15/13 03:	02 PM by CHEATON
Institutional Proposal Contacts Custom Data Special Review	Intellectual Property Revie	ew Distribution Attachmen	ts Institutional Proposal Actions	Medusa				
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Institutional Proposal	▶ show							
Sponsor & Program Information	▶ show							
Financial	▶ show							
Graduate Students	▶ show							
Notes and Attachments (0)	▶ show							
Delivery Info	▶ show							
Keywords	▶ show							
)

Figure 4 - Viewing an Institutional Proposal

4. To view medusa, select the **Medusa** link in the **Actions** column of the search results or select the **Medusa** tab on the Institutional Proposal document. The **Medusa** section shows the entire research administration lifecycle for a document.



Kuali Coeus Institutional Proposal Quick Reference Card

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Figure 5 - Viewing Medusa

Getting Help

For questions or problems using Kuali Coeus Institutional Proposal Quick Reference Card, email the Support Team at ra-help@mit.edu Include your Name, Contact Information, and the Institutional Proposal Number.