Introduction

The Kuali Foundation is a non-profit, 501(c)(3) corporation that coordinates the development of free/open source administrative software under the Educational Community License. The name “Kuali” came from the Malaysian word for “wok.” At a time when many colleges and universities are paying tens of millions of dollars for administrative systems, the notion of a wok—a humble, but essential cooking pan—seemed appropriate.

The Foundation is incorporated in the United States. Its members are colleges, universities, commercial firms, and interested organizations that share a common vision of open, modular, and distributed software systems. In order to deliver software for the full range of higher education institutions, the initial schools included a diverse group of institutions, large and small, to establish a community for all. These schools then pooled together a variety of resources, including an Andrew Mellon grant and assistance from the National Association of College and University Business Officers (NACUBO), to found the Kuali Project. Their goal: to create a financial system that was built by higher education, for higher education.

After the success of the Kuali Financial System project, The Foundation soon realized the potential of community source software and began expanding out to other projects. The Kuali Foundation was established in order to hold the intellectual property and provide financial and legal management. Kuali Coeus (KC) software was developed to help institutions create, submit and track research grant proposals.
Just like a traditional grant proposal process, MSU’s KC process is divided into three umbrella categories:

- Preaward
- Award
- Compliance

The following chart illustrates into which category each module is grouped.
Kuali Coeus Overview

From a high level, MSU Kuali Coeus application consists of five main modules covering the following functional subject matter areas: Proposal Preparation and Submission; Proposal Tracking; Negotiations; Awards, Subawards, Report Tracking and Close-Out; and Research Compliance that interact with each other. Shared amongst them all are Database, Infrastructure, Rice, Reporting and Workflow-related components.

To maximize what you get out of reading this documentation, it is important that your understanding include two key points about Kuali Coeus software:

- Kuali Coeus is also an ongoing software project.
- The Kuali Foundation is the organization that is responsible for coordinating the software project.

The Kuali Coeus (KC) application consists of areas providing functionality in three key research administration areas described below.
Preaward

This section of KC is comprised of three distinct modules.

1. **Proposal Development and Budget**: Allows users to build a full proposal, including proposal data, attachments, and budget, to be submitted to an external sponsor. The module permits multiple users to simultaneously build a single proposal.

2. **Institutional Proposal**: Is the official record of proposals submitted and contains summary data (for internal audiences) of proposals that have been submitted to external sponsors. While works-in-progress are stored and edited in the Proposal Development module, only proposals that have been submitted to the sponsor are tracked and stored in the Institutional Proposal module. Institutional Proposal records may be modified by the Office of Sponsored Programs or Business Connect to make corrections to proposal data. If a proposal is funded, the data in the Institutional Proposal record is used to form the basis of the Award record. College, department, or other personnel that have project or oversight responsibilities can view information in the Institutional Proposal record, but are not permitted to edit.

3. **Negotiation**: Allows the Office of Sponsored Programs and Business Connect to keep notes, track the progress, and easily assess the status of activities and negotiations associated with proposals, awards and/or subawards. College, department, or other personnel who have project or oversight responsibilities can view information in the Negotiations record.
Award

This area of KC is made up of the following modules:

1. **Award**: Allows Contract and Grant Administration to maintain detailed information on awards and subawards including a complete history of changes made from the time the award is received through closeout. Information maintained includes sponsor contacts, reporting requirements (financial, technical, property, patents), award terms and conditions, required cost sharing, special reviews (animals, human subjects, export controls, etc.), and F&A rates. Overall project budget and time & money information is maintained via the Award Document. In addition, the module maintains the required approvals for acquisition of equipment, foreign travel, and subawards. College, department, or other personnel that have project or oversight responsibilities can view information in the Award record.

2. **Subaward**: Subaward information is maintained under the award that funds the agreement and contains detailed information on that subaward agreement. Information maintained in this module includes: the amount, the start and end dates, the investigator at the receiving organization, other administrative contacts, and all required closeout information. Historical information is captured as the subaward is modified to allow tracking of change orders to the sub-recipient agreement. Additionally, funds released from incoming invoices are also maintained. College, department, or other personnel that have project or oversight responsibilities can view information in the Subaward record.

3. **Report Tracking**: Allows individuals that are responsible for tracking or submitting required financial, technical, or other reports to track due dates and submission status for each report. This module has grouping and sorting capabilities to allow custom reports to be generated directly from the application that are relevant to the PI, department administrators and/or CGA. Three views are available. These views can be subsequently modified to tailor the report to the user specification. Once the reports are sorted and grouped, the information can be exported.

Research Compliance

Research compliance consists of a single module, Conflict of Interest, or COI.

**Conflict of Interest**: Allows authorized users to check and maintain financial interest disclosures that may compromise research work. Investigators will maintain their financial interest disclosures in the Kuali Coeus database. The Office of Sponsored Programs, Business Connect, and Contract and Grant Administration can track the apparent conflicts through their resolution and maintain the required Conflict of Interest disclosure reports for individuals on existing proposals and awards.
Organization and Conventions

*Information Architecture and 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 textbook.

*Typographic Conventions*

**Clickable Icons, Buttons, Options, and Links**: This document adheres to simple 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.

**Numbering and Indentation**: Sequential tasks are numbered, while integrated notes and action results are indented in procedures.

**User Interface Element Name References**: First initials of each word are generally capitalized when referencing names of documents, pages, sections, and subsections, as is consistent with the user interface element naming convention.

**Options and Examples**: Courier New font is used to format list options and input examples.

**Graphics and Screen Shot Images**: Mouse pointer icons and callouts are used frequently on graphics to show you what to click on at each process step. Where possible, fields in portions of screens are populated with example data to demonstrate acceptable or expected input.

*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.
Using the online help

Click the question mark (?) icon to access the help system, which provides document, page, or section-level help from anywhere in the application.

Figure 1. Kuali Coeus Context-Sensitive In-Application Help System - E-Doc Help Example