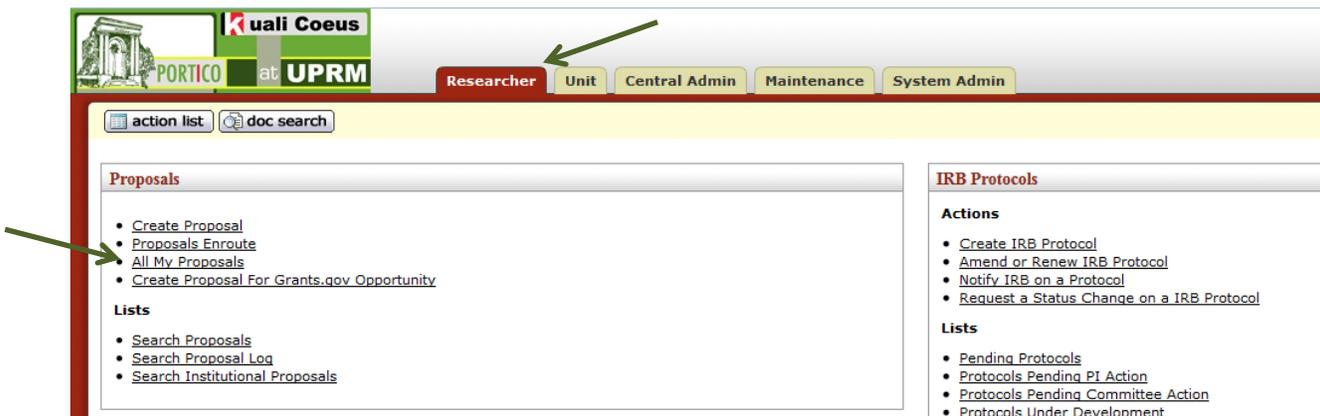




Adding Key Personnel to a Proposal:

The Key Personnel page is where you identify the Principal Investigator (PI) of the proposal as well as any additional Co-Investigators (Co-I), and project Key Persons (other Key Personnel).

- To begin, you need to find a specific Proposal Development Document. If it isn't already open, you have to do the following:
 - Log in to the Kuali Coeus web page
 - Click on the **Researcher** tab On the Upper Left side of the screen, click on **All my Proposals**.



- The Document Search screen will appear. Your username should appear in the Initiator box.

- Click on **search** to see your Documents:

Document Search

Searches

* required field

Document Type:	ProposalDevelopment
Initiator:	rafaelo.ruiz
Document Id:	
Application Document Status:	
Date Created From:	
Date Created To:	
Aggregator:	
Budget Creator:	
Narrative Writer:	
Viewer:	
Name this search (optional):	

search clear

- A listing of your documents will appear underneath. Click on the document's Document Id number to retrieve a document. The Proposal Development Document will appear.

uali Coeus
 PORTICO at UPRM
 Researcher Unit Central Admin Maintenance System Admin
 5.1.1 UPRM 04Sep13 (MySQL)
 Logged in User: rafaello.ruiz
 Login Logout

action list doc search
 Document Search
 detailed search superuser search clear saved searches
 Searches * required field

Document Type: ProposalDevelopment
 Initiator: rafaello.ruiz
 Document Id:
 Application Document Status:
 Date Created From:
 Date Created To:
 Aggregator:
 Budget Creator:
 Narrative Writer:
 Viewer:
 Name this search (optional):
 search clear

One item retrieved.

Document Id	Document Type	Title	Status	Initiator	Date Created	Aggregator	Budget Creator	Narrative Writer	Viewer	Route Log
3321	Proposal Development Document	Development of a Lo; Proposal No: 9; PI: null; Sponsor: Department Of ...	SAVED	RUIZ MALDONADO, RAFAEL O.	09/16/2013 02:02 PM					

- Click on the Key Personnel Tab.

Proposal Development Document
 Doc Nbr: 3321 Status: In Progress
 Initiator: rafaello.ruiz Created: 02:02 PM 09/16/2013
 Sponsor Name: Department Of Energy PI:

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions Permissions
 Proposal Summary Proposal Actions Medusa

expand all collapse all * required field

Required Fields for Saving Document
 Proposal Number: 9 * Sponsor Code: CID049 Department Of Energy
 * Proposal Type: New * Project Start Date: 09/04/2013
 * Lead Unit: RU-15001 - DIRECTOR'S OFFICE * Project End Date: 09/03/2015
 * Activity Type: Research
 * Project Title: Development of a Lower-Cost Hybrid Car Battery

Institutional Fields Conditionally Required
 Award ID:
 Original Institutional Proposal ID:

- The Add Key Personnel search selection screen will appear. Click on the magnifying glass next to Employee Search to find a University employee.

Proposal Development Document ?

Doc Nbr:	3321	Status:	In Progress
Initiator:	rafaelo.ruiz	Created:	02:02 PM 09/16/2013
Sponsor Name:	Department Of Energy	PI:	

[Proposal](#) [S2S](#) [Key Personnel](#) [Special Review](#) [Custom Data](#) [Abstracts and Attachments](#) [Questions](#) [Budget Versions](#) [Permissions](#)
[Proposal Summary](#) [Proposal Actions](#) [Medusa](#)

Document was successfully saved. expand all collapse all * required field ?

Add Key Person

*Person: *Proposal Role:

Principal Investigator is a required field prior to submission. Only one PI is allowed.

- On the KC Person Lookup screen, Enter the search criteria in the corresponding box. It is recommended you place asterisks before and after the data.
 - Use only the english language characters. Don't use characters from another language such as á, é, í, ó, ú or ñ in the spanish language. Instead just use a, e, i, o, u, n.
 - After you enter the data, click on the **search** button.

KcPerson Lookup ? * required field

KcPerson Id:	<input type="text"/>
Last Name:	<input type="text" value="*Maria*"/>
First Name:	<input type="text"/>
User Name:	<input type="text"/>
Email Address:	<input type="text"/>
Office Phone:	<input type="text"/>
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Home Unit:	<input type="text"/>
Campus Code:	<input type="text"/>

One item retrieved.

Return Value	KcPerson Id	Full Name	User Name	Email Address	Directory Department	Directory Title	Office Location	Office Phone	School	Active
return value	110083069	WALTER DE MARIA	walter.demaria	walter.demaria@upr.edu				787-832-4040		Yes

- One or more employees whose data corresponds to the search criteria will be retrieved. To select one employee, click on the return value button to the left of the employee's name

8. The corresponding name will be retrieved to the *Person box.
9. Click on the arrow to the right of the *Proposal Role box and select the correct role for the person: Principal Investigator, Co-Investigator or Key Person.

The screenshot shows the 'Add Key Person' form in a web application. At the top, there is a header for 'Proposal Development Document' with a help icon. Below this is a metadata table:

Doc Nbr:	3321	Status:	In Progress
Initiator:	rafaelo.ruiz	Created:	02:02 PM 09/16/2013
Sponsor Name:	Department Of Energy	PI:	

Below the metadata is a navigation bar with tabs: Proposal, S2S, Key Personnel, Special Review, Custom Data, Abstracts and Attachments, Questions, Budget Versions, and Permissions. Underneath are sub-tabs: Proposal Summary, Proposal Actions, and Medusa. On the right, there are 'expand all' and 'collapse all' buttons and a '* required field' label with a help icon.

The main form area is titled 'Add Key Person'. It contains two input fields: '*Person:' with the value 'WALTER DE MARIA' and '*Proposal Role:' with a dropdown menu. The dropdown menu is open, showing options: 'select', 'Co-Investigator', 'Key Person', and 'Principal Investigator'. A tooltip 'Proposal Person Role Id' is visible next to the dropdown. Below the fields are 'clear' and 'add person' buttons. A message reads: 'Principal Investigator is a required field prior to submission.' At the bottom are 'save', 'reload', and 'close' buttons.

10. The screen will look like this:

This screenshot shows the 'Add Key Person' form after the role has been selected. The '*Proposal Role:' dropdown now displays 'Principal Investigator'. The message below the form has updated to: 'Principal Investigator is a required field prior to submission. Only one PI is allowed.' The 'add person' button now has a red asterisk icon next to it. The rest of the interface, including the header, metadata table, and navigation tabs, remains the same as in the previous screenshot.

11. Click on the **Add Person** button and then click **save**.

12. The screen will show the Key Person entry:

Proposal Development Document ?

Doc Nbr:	3321	Status:	In Progress
Initiator:	rafaelo.ruiz	Created:	02:02 PM 09/16/2013
Sponsor Name:	Department Of Energy	PI:	MAURICIO VASQUEZ SANTAMARIA

Proposal S2S Key Personnel Special Review Custom Data Abstracts and Attachments Questions Budget Versions Permissions

Proposal Summary Proposal Actions Medusa

Document was successfully saved. expand all collapse all * required field ?

Add Key Person

*Person: Employee Search ? Non-employee Search ? *Proposal Role: select ?

clear add person

Principal Investigator is a required field prior to submission. Only one PI is allowed.

WALTER DE MARIA Principal Investigator show

Combined Credit Split hide

Combined Credit Split ?

WALTER DE MARIA
RU-ADEM - COLLEGE OF BUSINESS ADMINISTRATION

Unit Total:
Totals
Investigator Total:

recalculate

delete selected save reload close

13. Click on the **show** button next to the Key Person's name. New tabs will appear.

- Click on the **show** button next to Proposal Person Certification and fill the questionnaire; click on **save**.

Deleting Key Personnel

1. To delete a key person

- Click on the box next to the name (see below). A check mark will appear.
- Click on the **delete selection** button

WALTER DE MARIA Principal Investigator show

Combined Credit Split hide

Combined Credit Split ?

WALTER DE MARIA
RU-ADEM - COLLEGE OF BUSINESS ADMINISTRATION

Unit Total:
Totals
Investigator Total:

recalculate

delete selected save reload close