**Introduction**

This is a quick step-by-step for anyone searching for a Proposal in Kuali.

Log into Kuali, click **RESEARCHER** Menu Group.

If using the UNIT Tab, click the **search** on the Proposal Development Link.

The user can also just enter all or part of a word or phrase, such as “Search for” in the **Search Tasks** bar.
After clicking “Search for Proposals” Enter the selection criteria required, one or more of the 18 search criteria. **Select at least one field**, otherwise there will be a delay the return results and slow down the system. Let’s take a look at some of the search criteria:

![Search Tasks](image)

**Figure 1 Development Proposal Lookup (Part 1)**
1. **Proposal Number** identifies the actual Proposal Number

   ![Proposal Number Field]

2. **Proposal Type** is the status of the proposal. See dropdown arrow for the selection.

   ![Proposal Type Dropdown]

3. **Proposal State** is where the proposal is in relation to its life-cycle and routing.

   ![Proposal State Dropdown]

4. **Project Title** is a way to search by all or part of a title name. Use the *wild card asterisks between all or part of a name. Example the Project title contains the word *irradiance*

   ![Project Title Field with "irradiance"]

5. **Proposal Person** is someone who is named in the proposal as a PI other key person. Use the search key, enter the name then find the principal name (also your UMBC Campus ID) for this search. Then click SELECT button.

   ![Proposal Person Field with "dd0097"]
6. **Principal Investigator** is the principal Id of the PI. Use the Search Icon to first find the Principal ID of the PI if not known.

   ![Figure 2 Search for PI](image)

   Figure 2 Search for PI

Key in PI last name

![Figure 3 Search for PI by Last Name](image)

Figure 3 Search for PI by Last Name

![Figure 4 Search for Principal ID of the PI](image)

Figure 4 Search for Principal ID of the PI

![Figure 5 Search Results to Help Find Principal Investigator](image)

Figure 5 Search Results to Help Find Principal Investigator

7. **Aggregator** is the person or persons who create and maintain the proposal. Use the search to find the person’s Principal ID.
8. **Participant** is the person who has been added to the proposal with the Access Panel. *(do not use this at this time)*

9. **Initiator User Name** person creating the proposal. Use the search to find the person’s Principal ID.

![Figure 6 Development Proposal (Part 2)](image)

10. **Sponsor Deadline, Sponsor, Sponsor Name** identifies proposals by sponsor. Note that the viewer will only have access to proposals according to their permissions.

11. **Lead Unit, Lead Unit Name** is where the proposal is being managed.

12. **Award ID** identifies the Kuali Award Number assigned after the Proposal has been funded and an Award has been created.

13. **Opportunity ID** selects those proposals who have been identified with a Federal ID.

14. **Hierarchy Status** is the proposal hierarchy. **Not used at this time at UMBC**

15. **Proposal Create Date Range** is the dates between when the proposal was initiated in the system. Use the Calendar icon for assistance in entering dates.
Once one or more field has been entered, click Search at the bottom of the screen.

Here is an example of the proposal search results, by Lead Unit, Jnt. Ctr. Earth System Technology (10139):

For help with Kuali, contact your OSP Grants Manager, or send an email to ospa@umbc.edu

Note: additional information about the search results are available in the All About Proposals Training. For more training, see http://research.umbc.edu/kuali-training/

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