**Office of Research and Sponsored Programs**
University Massachusetts Boston
100 Morrissey Boulevard, Boston, MA 02125-3393
P 617.287.5370 | www.umb.edu/ORSP

# Kuali Build Forms Guide

This document guides users through how to access and manage Kuali Build Forms.

Kuali has developed resources to assist their customers with navigating and using Build Forms, anyone can access those generic resource instructions, see Kuali Build Basics.
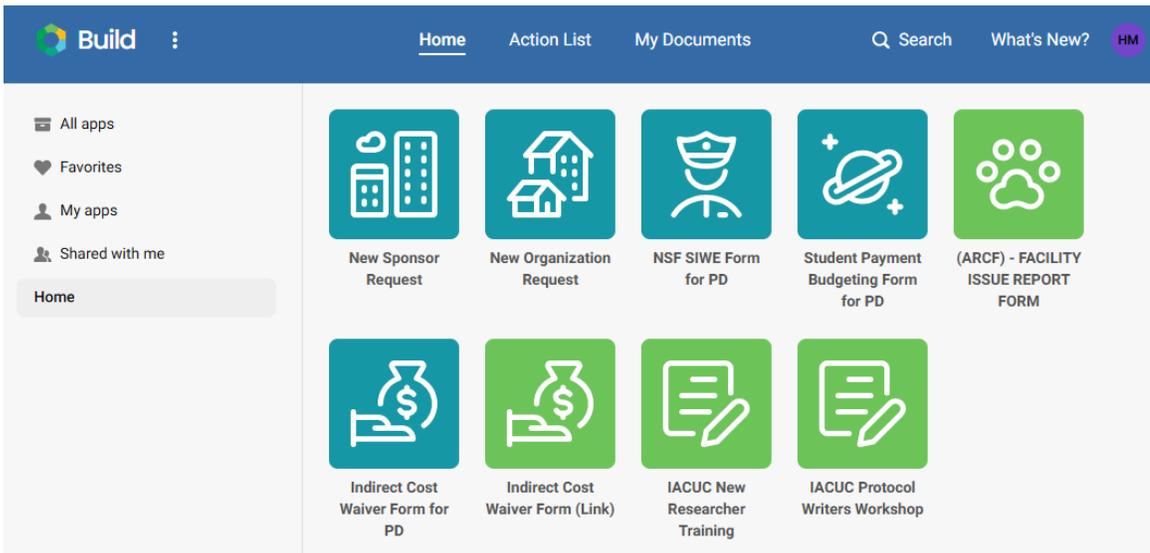
## Contents

## Login to Kuali Build

Navigate to the ORSP Kuali Webpage and click the Kuali Build Forms login button.
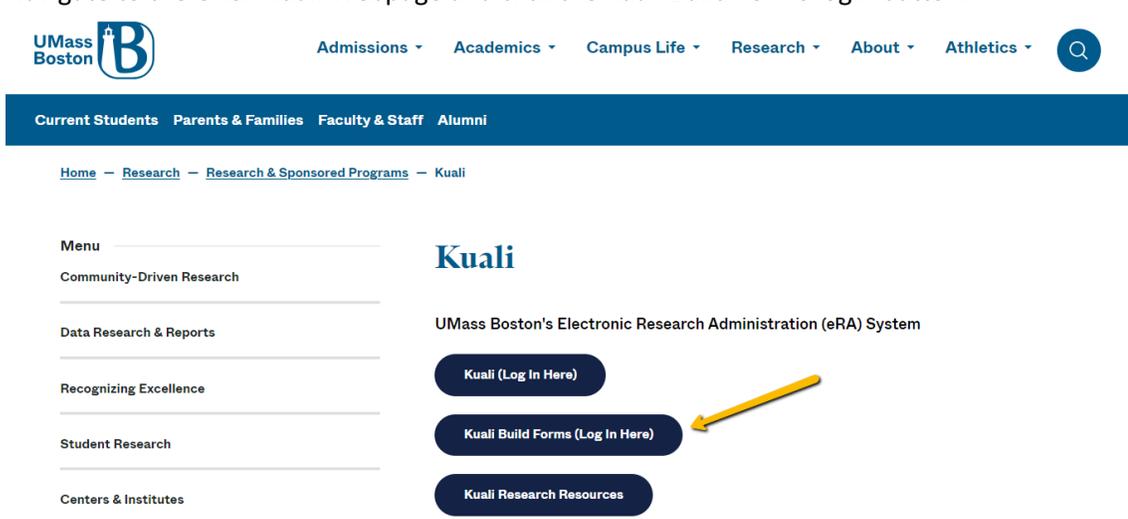


Kuali Build will default to your Home page.

Green apps launch from links
Teal apps launch from Kuali Proposal Development – Preproposal Forms

## Action List

To access your Action List, click on Action List in the upper center of the landing page of Kuali Build. This brings you to a list of any pending actions you have in the system, you can review and complete all Build actions from this page.



## Document List

To access the document list, click on the app. You will default to view the documents you have access to that were created in that app.  In the document list you can view each submission and status.  Click on a document line to see the form details.

← Indirect Cost Waiver Form for PD

| Number ↓ | Kuali PD Number | Submitted At | Submitter | PI Name | Lead Unit Name | Indirect Cost (F&A) Waiver Type | Select your ORSP Preaward GCA Contact | Workflow Status |
|---|---|---|---|---|---|---|---|---|
| 0067 | 564 | January 12, 2024 | O'Keefe, Robert A | Michael J Ward | MGS-Collins Ctr for Public Mgt | Pre-approved in UMB's F&A Rate Policy | Mary F. Harris | COMPLETE |
| 0065 | 389 | January 12, 2024 | O'Keefe, Robert A | Michael J Ward | MGS-Collins Ctr for Public Mgt | Pre-approved in UMB's F&A Rate Policy | Mary F. Harris | COMPLETE |
| 0059 | 550 | January 8, 2024 | Abend, Alan G | Kristin E Uiterwyk | Urban Harbors Institute | Pre-approved in UMB's F&A Rate Policy | Mary F. Harris | COMPLETE |
| 0056 | 538 | December 22, 2023 | Harris, Mary F | Kristin E Uiterwyk | Urban Harbors Institute | Pre-approved in UMB's F&A Rate Policy | Mary F. Harris | COMPLETE |
| 0055 | 487 | December 22, 2023 | Abend, Alan G | Kristin E Uiterwyk | Urban Harbors Institute | Pre-approved in UMB's F&A Rate Policy | Mary F. Harris | COMPLETE |

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## Download a Form PDF

To print a PDF of the form, click into the three dots in the upper right corner.

Then click the Export option.  A PDF will be downloaded to your web browser.
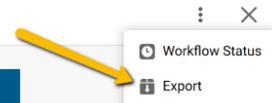
## View Status

To view the workflow status, under the same three dots menu noted above, click on the Workflow Status.  A sidebar will open to the right where you will see the workflow steps.
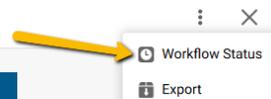
Toggle the arrow open or closed to view workflow step details. Those with permission to do so may resend Workflow notifications and skip or reassign the current approval stop.

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## Approving

Kuali Build sends an approval email notification anytime an approval action is required from a user. The approval email includes customized instructions for the specific form as well as links directly to the form to take the approval action. The email also includes a link to the Action List, see the Action List section for more information.

To approve, review the form and any attestations included in the communication. By clicking the Approve button, you are agreeing to any attestations as well as the details directly included on the form.

The Approve button is in the upper right corner of the form, click to approve.

## Send Back or Deny

Where the Approve button is in the upper right-hand corner, there are three dots, under those is a send back and a Deny option. You will have the option to include a comment which will display in the workflow status history for that form.

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## Notifications

Kuali Build sends notifications automatically as part of the built-in workflow routing. Notifications are customizable and will differ in appearance and content depending on the form and notification configuration.

Below is an example of an email from the Kuali Build system:

**From:** no-reply@mail.kualibuild.com

**To:** virginia.maki@umb.edu

**Subject:** Confirmation: Indirect Cost Waiver Form Submitted for Proposal 469

Thank you for submitting a Indirect Cost Waiver Form for your proposal.

The information on this form indicates this proposal is using a UMass Boston Preapproved indirect cost rate. No further review or approval is needed and a PDF of the form is attached for your records. If this is inaccurate, please reach out to your Preaward GCA contact.

Indirect Cost Waiver Form Number 0000

This email was automatically generated.

## Approval Notification

Below is an example of an approval email notification from Kuali Build. Note the Begin Review button at the bottom of the message, click this to navigate directly to the approval task.

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**From:** no-reply@mail.kualibuild.com

**To:** shala.bonyun@umb.edu

**Subject:** Approval: Indirect Cost Waiver Form for Proposal 0000 PI Satav, Shreeya

Hello Shala,

This is an Indirect Cost Waiver Form for a Sponsor Mandated or Unrestricted Proposal Waiver Type. Please review the Sponsor Mandated Rate and verify the documentation uploaded supports that rate, or verify the proposal qualifies as unrestricted.

Approve the form if the requested rate is accurate for the proposal.

**Indirect Cost Waiver Form Number 0000**

Form Name: **INDIRECT COST WAIVER FORM FOR PD**

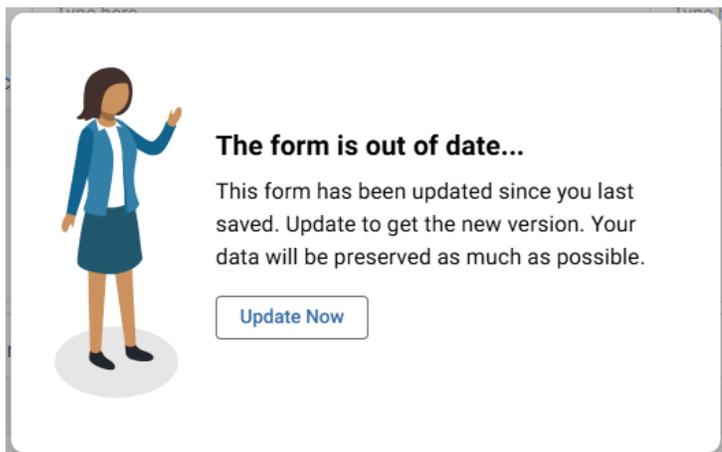Step Name: **GCA APPROVAL**

Your Action: **APPROVAL**

**Begin Review**

This email was automatically generated.

# Form is out of date

If a Build form has been updated by ORSP and you have a form that you have saved that has not been submitted into workflow approval routing, you may see the following message populate the next time you open that form.



### The form is out of date...

This form has been updated since you last saved. Update to get the new version. Your data will be preserved as much as possible.

**Update Now**

Accept the changes to the form by clicking the Update Now button, your form will then open with the updates in place.  Most often these changes will not be substantial, but you may need to re-enter some information.