# SPIRIT

Project Approvers

User Manual

## Logging into SPIRIT:

To access SPIRIT please utilize the following link: https://app.wku.edu/spirit/

Input your NET ID and password

You will have the option to navigate to All Projects, External Projects, RCAP Projects, FUSE Projects, and Search/Reports.
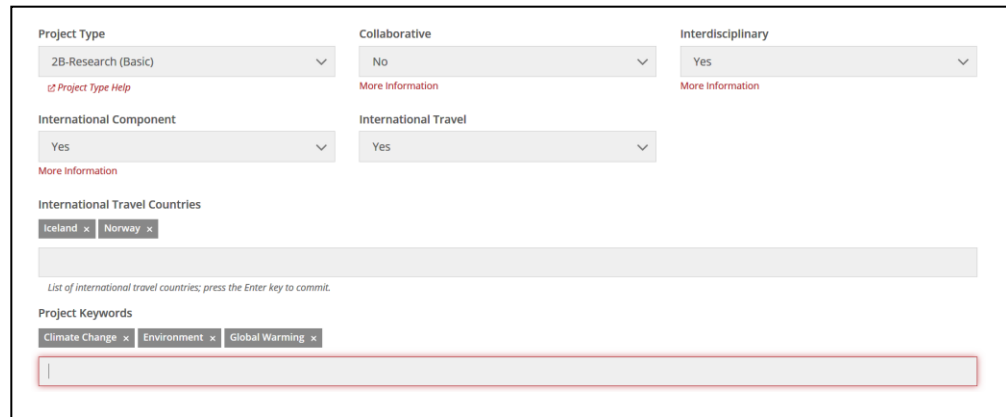
*SPIRIT is not compatible with Internet Explorer.

## Approving Projects:

If you are listed as project personnel or an approver on a project, you will receive an email from SPIRIT with instructions for approving. A link will be provided in the email that, once you login, will take you directly to the project requiring action.

➢ **Principal investigators** – PI's can navigate the project tabs to confirm that project details are accurate.

| Project | Chart of Accounts | Effort | Compliance | Approvals | Summary |
|---|---|---|---|---|---|

- o Navigate to the Compliance Tab:
  - ▪ PI's will need to complete all investigator and compliance questions on the Compliance Tab.
  - ▪ Helper text (in red) is available to assist you in completing some fields.
  - ▪ For keywords and country of travel (if applicable), you must type a keyword or country name and hit "enter" for it to be registered in the system. You can add multiple items by hitting "enter" after each item. When the item appears in gray, it is registered.

**Project Type**
2B-Research (Basic) ⌄
☑ Project Type Help

**Collaborative**
No ⌄
More Information

**Interdisciplinary**
Yes ⌄
More Information

**International Component**
Yes ⌄
More Information

**International Travel**
Yes ⌄

**International Travel Countries**
Iceland ✕  Norway ✕

*List of international travel countries; press the Enter key to commit.*

**Project Keywords**
Climate Change ✕  Environment ✕  Global Warming ✕

Save the data entered in the Compliance Tab by clicking "Save Project" at the bottom of the tab.
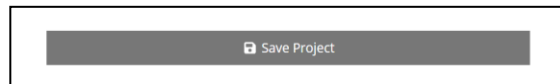
| 🖫 Save Project |
|---|
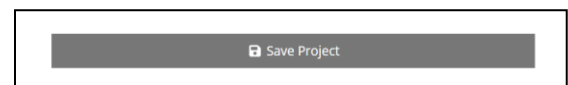
- o Next, navigate to the Approvals Tab:
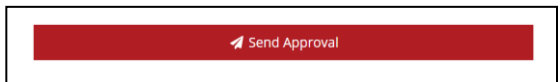  - ▪ The PI should find their approval record on the Approvals Tab.

- The PI should enter their department and college approver details. See helper text to confirm your college approver.



Principal Investigator
*Mary Muchmore — katie.muchmore@wku.edu*

**Department Head Name** | **Department Head Email**
*Name of the Department Head, or immediate supervisor.* | *Email of the Department Head, or immediate supervisor.*

**College Approver Name** | **College Approver Email**
*Name of the Dean (or Proxy), or Vice President, or the next-level supervisor.* | *Email of the Dean (or Proxy), or Vice President, or the next-level supervisor.*

More Information

- The PI should complete all four approval questions. Use helper text if you have questions.



**Conflict of Interest Policy**
Do you understand this policy?
More Information
○ Yes ○ No

**Financial Conflicts**
Do you agree to this certification?
More Information
○ Yes ○ No

**Responsibilities / Accountability**
Do you agree to the Post-Award Responsibilities & Accountability?
More Information
○ Yes ○ No

**Approved for Submission**
Do you approve this project for submission?
More Information
○ Yes ○ No

- Save the project record by clicking "Save Project" at the bottom of the Approvals Tab.



- Click "Send Approval" at the bottom of the Approvals Tab to route the project to the next approver.



➢ **Co-PIs/WKU Personnel** – Other project personnel can navigate the project tabs to confirm that project details are accurate.



| Project | Chart of Accounts | Effort | Compliance | Approvals | Summary |

o Navigate to the Approvals Tab:
  - Other project personnel should find their approval record on the Approvals Tab.

- Other project personnel should enter their department and college approver details. See helper text to confirm your college approver.



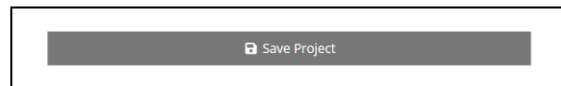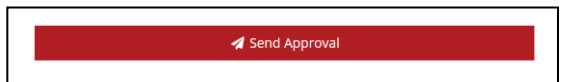- Other project personnel should complete all four approval questions. Use helper text if you have questions.



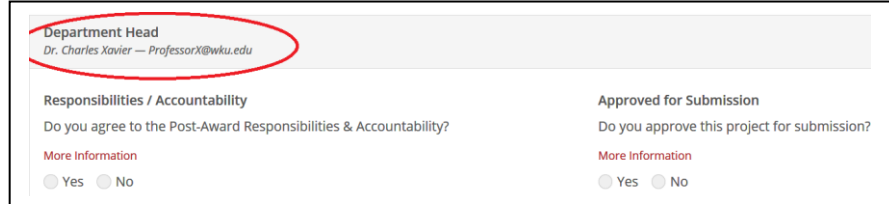- Save the project record by clicking "Save Project" at the bottom of the Approvals Tab.



- Click "Send Approval" at the bottom of the Approvals Tab to Route the project to the next approver.



➢ **Department, College, and Other Approvers** – Approvers will navigate the project tabs to review the project details. Project budget and other documents will be saved as attachments on the Projects Tab. Cost share (if applicable) will be listed in the Chart of Accounts Tab. Project personnel effort (if applicable) will be listed in the Effort Tab. Compliance information will be listed in the Compliance Tab.
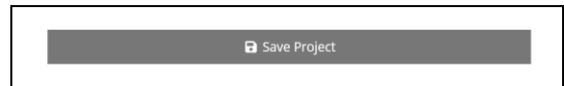
- o Navigate to the Approvals Tab:
  - Approvers should find their approval record on the Approvals Tab and should complete the two approval questions. Use helper text if you have questions.

**Department Head**
*Dr. Charles Xavier — ProfessorX@wku.edu*

**Responsibilities / Accountability**
Do you agree to the Post-Award Responsibilities & Accountability?
More Information
○ Yes  ○ No

**Approved for Submission**
Do you approve this project for submission?
More Information
○ Yes  ○ No

- Save the project record by clicking "Save Project" at the bottom of the Approvals Tab.

  🖫 Save Project

- Click "Send Approval" at the bottom of the Approvals Tab to route the project to the next approver and/or complete the approval process.

  ◢ Send Approval
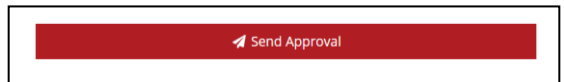
## Viewing an Existing Project:

You will have access to all projects that you are listed as project personnel or an approver on.

To view an existing external project that you are connected to, please select "External Projects". Then scroll to the table. You can enter proposal number, index number, or PI name in the search bar to filter to the record you wish to view.

| Proposal # ⬇ | Index # ⬍ | PI Last Name ⬍ |
|---|---|---|
| 11-0001 | Search | Wallace |

Find the record you wish to view.

| Proposal # ⬇ | Index # ⬍ | PI Last Name ⬍ | PI First Name ⬍ | Prime Sponsor Name ⬍ | Status ⬍ | Date Submitted ⬍ | Date Awarded ⬍ | Actions |
|---|---|---|---|---|---|---|---|---|
| 11-0001 | Search | Wallace | Search | Search | Search | Search | Search | |
| 11-0001 | | Wallace | Emily | National Science Foundation | Pending | | | ✎ |

Click to view the project. ✎

Navigate project tabs to see all viewable project details.

| Project | Chart of Accounts | Effort | Compliance | Approvals | Summary |
|---|---|---|---|---|---|