



## **Kuali Research Dashboard: Overview of Features**

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# Kuali Research Dashboard

The Kuali Research Dashboard is the user interface for KR, which provides tools to manage and search for relevant records based on your preferences and action list. The Dashboard also provides access to full search tools and common menu items for each module.

## Dashboard Home Page

When you log in to Kuali Research, the system will display the Dashboard Home Page, which contains Dashboard cards and an expandable navigation bar that allows users to access various resources in Kuali Research.

**Navigation Bar** Show/hide cards

**Proposals routing to me** Filter Sort by

1 step away Proposal #62107 - PI: Skerritt, Mosi - Sponsor: National Endowment for the Humanities - Title: Test...  
Due date: 10/08/2021 Last action: 9/27/2021 4:05 PM Compliance

You're up! Proposal #63149 - PI: Lapin, Hayim - Sponsor: US Air Force - Title: cim - Proposal to Approve... - Le...  
Due date: 10/01/2021 Last action: 9/20/2021 11:29 AM Compliance

1-2 < >

**Proposals not routing** Filter Sort by

Proposal Proposal #61784 - PI: Vaughn, Charlotte - Sponsor: National Science Foundation - Title: Episodic me...  
Due date: None Last action: 6/09/2021 3:42 PM

Proposal Proposal #55941 - PI: Moncrieffe, Michelle - Sponsor: Andrew W. Mellon Foundation - Title: The NA...  
Due date: 9/23/2020 Last action: 9/09/2020 3:52 PM

Proposal Proposal #50151 - PI: Flanagan, Kelly - Sponsor: National Endowment for the Humanities - Title: TES...  
Due date: None Last action: 1/08/2020 1:53 PM

1-3 < >

**Proposal workload assignments** Filter

Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#62107	Skerritt, Mosi	National Endowment for the Humanities	1272301	Test proposal for documentation	10/08/2021	09/27/2021 4:05 PM	Klein, Lisa S	
#63149	Lapin, Hayim	US Air Force	1272501	cim - Proposal to Approve - Maxine Grossman	10/01/2021	09/20/2021 11:29 AM	Wright, Julie O.	
#62990	Bell, Richard	Carnegie Corporation of New York	1272301	The First Freedom Riders: Streetcars and Street Fights in Jim Crow New York	08/16/2021	08/13/2021 11:38 AM	Frankenfield, Jill A.	
#62410	Camruthers, Peter	John Templeton Foundation	1273301	Human Motives: egoism, hedonism, and the science of affect	08/20/2021	07/23/2021 12:07 PM	Frankenfield, Jill A.	
#59450	Kim, Ji Youn	Massachusetts Institute of Technology	1271501	Request to Access Non-Aggregated Data for Research Purposes - Normative influence on Covid-19 prevention behaviors. A cross-national comparative study	03/05/2021	03/05/2021 2:19 PM	Frankenfield, Jill A.	

Rows per page 10 1-5 < >

**Expand/Collapse**

### Dashboard Cards

There are three dashboard cards that all relate to Proposal Development. Within each card, you may click on an item to open the record. See the Dashboard Cards page for more detailed information on cards.

### Collapse Menu












Collapse Menu (located in the lower-left corner) allows you to expand the navigation bar to display the descriptions for each icon. This is helpful to familiarize yourself with the Dashboard Home page, and you may choose to collapse the bar later and simply show the icons if you would like more screen space.

### Show/Hide Cards

The Show/Hide Cards button in the upper right corner allows you to select which cards you want to show or hide.

## Navigation Bar

The Navigation Bar on the left allows you to navigate to various sections of Kualu Research.

 Dashboard	Returns to the Dashboard Home page.
 Search Records	Search provides a new, all-in-one comprehensive search of Awards, Institute Proposals, Subawards, Development Proposals, and other records.
 Common Tasks	Displays the most common tasks for each module in KR, including accessing full searches for each module, creating new records, and having a link to your action list.
 All Links	Displays links to various lookup tables for sponsors, organizations, and address book records as well as for commons tasks.
 Help	Opens a new window with a generic help guide. Please use the customized UMD-provided guides found on the ORA website here: <a href="#">Kuali Research Resources</a>
 About	Lists the current version of Kualu Research.
 Logout	Allows you to log out of Kualu Research.
 Miller, Carolyn LaLumiere 	Displays the current user. If you click on this accidentally, it will open up a new browser tab with your user information. You may simply close this tab and return to your previous tab. You may also return to Kualu Research by clicking on Switch Apps > Research Home.
 Switch Apps	Allows you to switch to different apps in the Kualu Suite. Please only use the Research Home and return to Kualu Research.
 Collapse Menu	Collapse Menu allows you to expand and collapse the navigation bar. When you expand, you can see descriptions for each icon, and when you collapse the bar, you only see the icons for each item.

# Dashboard Cards

After you log into Kualu Research, you will see the Dashboard Home page. There are three sections called “cards” presented, which are named “Proposals Routing to Me,” “Proposals Not Routing,” and “Proposal Workload” that all relate only to Proposal Development activities. If you are not a Proposal Creator, Approver, or Viewer, you may want to bypass this page and go directly to a different page like “Common Tasks,” “All Links,” or “Search Records” to best suit your needs. You may also elect to hide any cards you wish not to see by clicking on the “Show/Hide Cards” button and unchecking each.

**Navigation Bar**

**Filter**

**Show/Hide cards**

**Cards**

**Expand/Collapse**

**Proposals routing to me**

- 1 step away: Proposal #63149 - PI: Lapin, Hayim - Sponsor: US Air Force - Title: cIm - P...  
Due date: 10/01/2021 Last action: 9/20/2021 11:29 AM Compliance
- 2 steps away: Proposal #63139 - PI: Miller, Carolyn - Sponsor: US Air Force - Title: cIm - ...  
Due date: 10/01/2021 Last action: 9/13/2021 3:10 PM Compliance
- 1 step away: Proposal #63136 - PI: Miller, Carolyn - Sponsor: NIH-Proposal Only - Title: ...  
Due date: 8/31/2021 Last action: 9/21/2021 4:54 PM Compliance

**Proposals not routing**

- Proposal: Proposal #63150 - PI: Kang, Christine - Sponsor: US Air Force - Title: test ...  
Due date: 5/01/2022 Last action: 9/21/2021 9:15 AM
- Proposal: Proposal #63146 - PI: Egloff, Sally - Sponsor: NASA - Proposal Only - Title...  
Due date: 9/30/2021 Last action: 9/14/2021 11:16 AM Compliance
- Proposal: Proposal #63147 - PI: Egloff, Sally - Sponsor: NASA - Proposal Only - Title...  
Due date: 9/30/2021 Last action: 9/14/2021 11:16 AM Compliance
- Proposal: Proposal #63146 - PI: Egloff, Sally - Sponsor: NASA - Proposal Only - Title...  
Due date: 9/29/2021 Last action: 9/14/2021 11:16 AM Compliance
- Proposal: Proposal #63145 - PI: Egloff, Sally - Sponsor: NASA - Proposal Only - Title...  
Due date: 9/30/2021 Last action: 9/14/2021 9:28 AM

**Proposal workload assignments**

Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#63149	Lapin, Hayim	US Air Force	1272501	cIm - Proposal to Approve - Maxine Grossman	10/01/2021	09/20/2021 11:29 AM	Wright, Julie O.	
#63139	Miller, Carolyn	US Air Force	1320701	cIm - Proposal to Approve - Cathy	10/01/2021	09/13/2021 3:10 PM	Chapman, Ashley Noelle	
#63136	Miller, Carolyn	NIH-Proposal Only	1420102	CMK_DO NOT SUBMITa	08/31/2021	08/31/2021 4:54 PM	Clark, Denise J	
#63130	Miller, Carolyn	Army Material - Electronics	1420101	CMK_DO NOT SUBMIT	08/30/2021	08/30/2021 3:31 PM		
#63127	Everts, Kathrynne	STMD-State of Maryland	1250524	HRHC: Technical Study of Forests in Maryland - Michelle Prantice	10/01/2021	08/30/2021 2:24 PM	Vernon, Jessica A.	

## Proposals Routing to Me Card

This card allows Proposal Development Approvers to easily monitor proposals queued up for their approval and watch for proposals they will soon have to approve. The colored “steps” tab shows you available proposals for your immediate approval or one or more steps away. The details for each entry show a summary of information along with the proposal’s due date (deadline) and who took the last action. To open a proposal for review/approval, click on any proposal that reports “You’re Up!” Once you or another approver on that stop have addressed all the approvals required, the proposal will be removed from this card. If a proposal is recalled or returned, it is from the card.

The screenshot shows a web interface for monitoring proposals. At the top, there are labels for 'Steps Away From Your Approval', 'Filter', and 'Sorting Options'. Below these is a header 'Proposals routing to me' with a 'Filter' button and a 'Sort by' dropdown menu. The main content area contains two proposal entries. The first entry is labeled '1 step away' and has a yellow background. The second entry is labeled 'You're up!' and has a red background. Both entries include details such as proposal number, PI name, sponsor, title, due date, and last action. A 'Compliance' link is visible in the second entry. At the bottom, there are labels for 'Compliance Items' and 'View Additional Records' with a pagination indicator '1-2' and navigation arrows.

If you are an alternate approver, the word Alternate is displayed below You’re Up! and 1 step away.

Two buttons are shown side-by-side. The first button is red and contains the text 'You're up!' above 'Alternate'. The second button is yellow and contains the text '1 step away' above 'Alternate'.

## Proposals Not Routing Card

Proposal Creators may use this card to monitor which proposals they are still working on and haven't been submitted for approval yet. This card also allows Proposal Development Approvers to monitor which proposals have been created and not yet submitted for their approval yet. To open a proposal to view or edit, click on the entry. If you are a Proposal Creator with edit rights in the Proposal's Lead Unit, you will be placed in edit mode after clicking on the entry.

The screenshot shows a 'Proposals not routing' card with a list of proposals. Annotations include:

- Filter** and **Sorting Options** pointing to the top right controls.
- Compliance Items** pointing to a table below the proposals.
- View Additional Records** pointing to a button at the bottom right.

Proposal	Details
Proposal #63162	PI: Miller, Carolyn - Sponsor: DHHS-Health Resources and Services Administration - Title: Proposal ... Due date: 10/28/2021 Last action: 9/29/2021 8:19 AM <b>Compliance</b>
Proposal #63161	PI: Miller, Carolyn - Sponsor: NASA - Proposal Only - Title: Proposal for Investigator... - Lead unit: 1... Due date: 10/28/2021 Last action: 9/28/2021 12:52 PM
Proposal #63153	PI: Miller, Carolyn - Sponsor: DHHS-Health Resources and Services Administration - Title: Proposal ... Due date: 10/28/2021 Last action: 9/28/2021 10:47 AM <b>Compliance</b>
Proposal #63152	PI: Miller, Carolyn - Sponsor: DHHS-Health Resources and Services Administration - Title: Proposal ... Due date: 10/28/2021 Last action: 9/28/2021 10:42 AM <b>Compliance</b>
Proposal #63151	PI: Miller, Carolyn - Sponsor: DHHS-Health Resources and Services Administration - Title: Proposal ... Due date: 10/28/2021 Last action: 9/28/2021 10:25 AM <b>Compliance</b>

Type	Status
Human Subjects	Not yet applied
Financial COI	Not yet applied

## Proposal Routing Card Features

The "Proposals Routing to Me" and "Proposals Not Routing" cards have similar options that allow you to utilize them better and tune the cards to suit your needs better.

### Sorting Options

The sorting options menu includes:

- Ascending
- Descending
- Deadline Date
- Last Action Taken Date
- Principal Investigator
- Proposal Number
- Sponsor Name
- Steps to Approve

### Filter

The filter interface shows:

- 1 Filter Applied
- Where  is
- + Add a Filter

## Compliance Items Tag

If a proposal has a Compliance item listed, you may click on the “Compliance” Tag Compliance to get a quick view of each item and its status.

## View Additional Records

You can view the total count of records in each card and navigate through the entire listing by clicking on the directional buttons in the bottom right ( < > ).

## Sorting Options

You have options to sort the entries in each card based on your own preferences:

- **Deadline Date** - Sort by the proposal deadline. This is a good option to prioritize proposals that will require approvals the soonest in the “Proposals Routing to Me” card or will need to be submitted for approval the soonest in the “Proposals Not Routing” card. (NOTE: If a deadline date wasn’t added by the proposal creator it will be at the end of your list in both ascending and descending order)
- **Last Action Taken** - Sort proposals by the most recently approved or saved activity.
- **Principal Investigator** - Sort proposals by PI.
- **Proposal Number** - Sort proposals by Proposal Number.
- **Sponsor Name** - Sort proposals by Sponsor Name.
- **Step to Approve** - (Only for “Proposals Routing to Me”) Sort proposals by how many steps until they require your approval. This is also a good option that allows you to prioritize your view to show what proposals you may immediately act on to approve.

## Proposal Workload Card

This card allows anyone with Proposal view access to see which proposals are still currently in the process of being approved across all routing stops. Unlike the “Proposals Routing to Me” card, you will see each proposal listed throughout the entire approval process once it has been submitted for approval. When viewing the “Current Request(s)” column you can observe who the current primary approver is (e.g. Chair, Dean, ORA Representative). The “Assigned Approver” field will always be blank. Once a proposal has been completely approved it will be removed from this card. If a proposal is recalled or returned, it will also be removed from the card until it gets routed for approval again.

The screenshot shows a table titled "Proposal workload assignments" with the following columns: Proposal Number, Principal Investigator, Sponsor, Lead Unit, Title, Due Date, Last Action, Current Request(s), and Assigned Approver. The table contains five rows of data. Annotations include: "Click Any Column Header to Sort" pointing to the "Last Action" header; "Click on Proposal Number to Open Record" pointing to the "#63156" cell; "Increase Rows Viewable per Page" pointing to the "Rows per page" dropdown menu which is set to "5"; and "View Additional Records" pointing to the right arrow navigation button. A "Filter" button is also visible in the top right corner.

Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#63160	Miller, Carolyn	NASA - Proposal Only	1281501	Proposal for Approving Class on 09/28/21 - CKANG1	10/28/2021	09/28/2021 12:51 PM	Justice, Chris	
#63159	Miller, Carolyn	NASA - Proposal Only	1420501	Proposal for Approving Class on 09/28/21 - wej	10/28/2021	09/28/2021 12:46 PM	Howard, Bret B.	
#63158	Miller, Carolyn	NASA - Proposal Only	1322501	Proposal for Approving Class on 09/28/21 - jwalb416	10/28/2021	09/28/2021 12:18 PM	Fisher, John P	
#63157	Miller, Carolyn	NASA - Proposal Only	1280901	Proposal for Approving Class on 09/28/21 - billing	10/28/2021	09/28/2021 12:16 PM	Billing, Amy S.	
#63156	Miller, Carolyn	NASA - Proposal Only	1251111	Proposal for Approving Class on 09/28/21 - shenley	10/28/2021	09/28/2021 12:00 PM	Aubry, Christopher P.	

## View Additional Records

You can view how many records there are in the card and navigate through the full listing by clicking on the directional buttons in the bottom right ( < > ). You may also increase the number of records visible per page by clicking on the “Rows per Page” option and selecting a larger number.



### Sorting Options


You may sort any of the columns by clicking the column header to view either in ascending or descending order.

#### Hints and Tips!



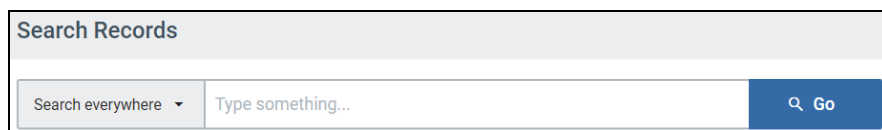
##### Refreshing

When you are returning to the Dashboard page after approving or taking action in a proposal you may not see those changes instantly reflected on the Dashboard page. The Dashboard page will refresh automatically every 5 minutes. If you would like to refresh your results sooner than that though you may click on the refresh button in your web browser. (Shortcut Keys: “F5” in Windows, “Command” + “R” on Macs).

**NOTE:** Clicking on the Dashboard button () does not refresh the page while you are currently on it.

# Search Records Page

The Search Records page provides a comprehensive all-in-one search of Awards, Institute Proposals, Subawards, Development Proposals, and other records based on your search criteria. It is most useful when you need to search across multiple document types (Award, Institute Proposal, Subaward, etc.).



The screenshot shows a search bar with the title "Search Records" above it. The search bar has a dropdown menu on the left labeled "Search everywhere" and a text input field containing "Type something...". To the right of the input field is a blue button with a magnifying glass icon and the text "Go".

**NOTE:** The traditional full search tools are still available and useful when you want to search within each module (Award, Institutional Proposal, Subaward, Proposal Development, etc.). To utilize the full search tools, navigate to the Common Tasks page, and click on the search option under the appropriate module.

## How do I search?

Type in your search criteria and click "Go" or press enter to initiate a search.

- You may type in one word or a combination of words.
- You may use the search operator "-" to remove specific values from your results.
- You may use double quotes for phrases or strings of text (e.g., "apple tree," "301000-00001") but not with search operators.
- You cannot search multiple values of the same item simultaneously (e.g., acct 5212345 and acct 4301234).
- Keep in mind, when performing a search, it may return results that contain only a portion of that value (e.g., searching 320101 and will match with 1320101).

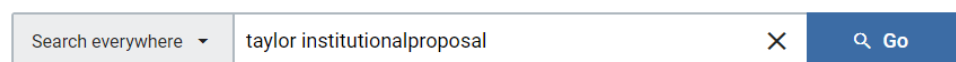
## Below are some example of simple searches:

Doing a broad search by name may result in too many results.



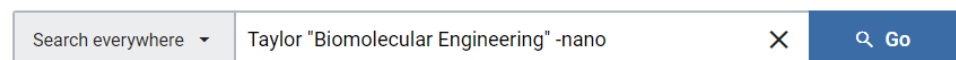
A search bar with "Search everywhere" dropdown, "Taylor" in the input field, a clear button (X), and a "Go" button.

You can add the document type of the desired records in the search to help limit your results by module.



A search bar with "Search everywhere" dropdown, "taylor institutionalproposal" in the input field, a clear button (X), and a "Go" button.

Try adding additional search terms in phrases and excluding what you don't want with a "-"



A search bar with "Search everywhere" dropdown, "Taylor 'Biomolecular Engineering' -nano" in the input field, a clear button (X), and a "Go" button.

Search for award numbers using quotes or removing dash (if not, the search will misinterpret the "-").



A search bar with "Search everywhere" dropdown, "'300734-00002'" in the input field, a clear button (X), and a "Go" button.

Search by the first 6 characters of an award family to return parent and children (-00001, -00002, etc.)



A search bar with "Search everywhere" dropdown, "300734" in the input field, a clear button (X), and a "Go" button.

Searching by account number will return any awards and subawards funded by that account number.



A search bar with "Search everywhere" dropdown, "4325930" in the input field, a clear button (X), and a "Go" button.

## Narrow Search by category

Narrow your searches by clicking on the “Search everywhere” drop-down to see a list of all the available searchable categories and select one. This will allow you to target which field you’d like to search within using specific values in instead of searching across all fields. If you are getting lots of unwanted results, using the category limits here is highly recommended.

### Click Search Everywhere

Search everywhere ▾ Type something... Go

Narrow search by category

Filter categories... You can narrow your search to a specific category. After searching you can add additional parameters.

Popular	Dates	More options				
<a href="#">Award Number</a>	<a href="#">Date Created</a>	<a href="#">Account Id</a>	<a href="#">Award Number</a>	<a href="#">Lead Unit</a>	<a href="#">Previous Grants.gov Tracking Id</a>	<a href="#">Special Review Type</a>
<a href="#">Lead Unit</a>	<a href="#">Date Last Action Taken</a>	<a href="#">Activity Location</a>	<a href="#">CFDA Number</a>	<a href="#">Namespace</a>	<a href="#">Primary Approvers</a>	<a href="#">Sponsor</a>
<a href="#">Personnel</a>	<a href="#">Deadline Date</a>	<a href="#">Activity Type</a>	<a href="#">Days Until Next Deadline</a>	<a href="#">Negotiation Activity Last Modifier Name</a>	<a href="#">Prime Sponsor</a>	<a href="#">Sponsor Number</a>
<a href="#">Principal Investigator</a>	<a href="#">End Date</a>	<a href="#">Administrators</a>	<a href="#">Development Proposal Number</a>	<a href="#">Negotiation Activity Location</a>	<a href="#">Principal Investigator</a>	<a href="#">Status</a>
<a href="#">Proposal Number</a>	<a href="#">Execution Date</a>	<a href="#">Agency Routing Id</a>	<a href="#">Document Number</a>	<a href="#">Negotiation Activity Number of Days</a>	<a href="#">Principal Investigator Id</a>	<a href="#">Subaward Id</a>
<a href="#">Sponsor</a>	<a href="#">Follow-Up Date</a>	<a href="#">Agreement Type</a>	<a href="#">Document Title</a>	<a href="#">Negotiation Activity Type</a>	<a href="#">Program Announcement</a>	<a href="#">Title</a>
	<a href="#">Negotiation Activity Follow-Up Date</a>	<a href="#">Approval Priority Stop</a>	<a href="#">Document Type</a>	<a href="#">Negotiation Id</a>	<a href="#">Proposal Number</a>	<a href="#">Total Budget Proposal Amount</a>
	<a href="#">Start Date</a>	<a href="#">Approver</a>	<a href="#">Hierarchy Child</a>	<a href="#">Negotiator</a>	<a href="#">Requisitioner</a>	<a href="#">Total Obligated Award Amount</a>
		<a href="#">Assigned Approver</a>	<a href="#">Hierarchy Route Status</a>	<a href="#">Opportunity Id</a>	<a href="#">Route Status</a>	<a href="#">Type</a>
		<a href="#">Associated Document Number</a>	<a href="#">Initiator</a>	<a href="#">PO Number</a>	<a href="#">Sequence Status</a>	<a href="#">View Units</a>
		<a href="#">Association Type</a>	<a href="#">Institutional Proposal Number</a>	<a href="#">Parent Proposal Number</a>	<a href="#">Site Investigator</a>	
			<a href="#">Last Action User</a>	<a href="#">Personnel</a>	<a href="#">Special Review Status</a>	

Once you choose the category, type in the desired search value then, click enter or “Go.”

Search Lead Unit 1320101 Go

You will now see that the search variable has been slotted below the search bar.

Search everywhere ▾ Type something... Go

Lead Unit: 1320101 Clear All

If you want, you may continue to narrow down your results further by adding additional categories. Just repeat the process of selecting a category, entering the desired value, and clicking “Go” or enter.

Search everywhere ▾ Type something... Go

Lead Unit: 1320101 Document Type: InstitutionalProposal Clear All

NOTE: If you’d rather not look through the categories, you may also filter the listing by typing keywords.

Narrow search by category

Lead You can narrow your search to a specific category. After searching you can add additional parameters.

Popular [Lead Unit](#)

More options [Lead Unit](#)

## Show/Hide Columns

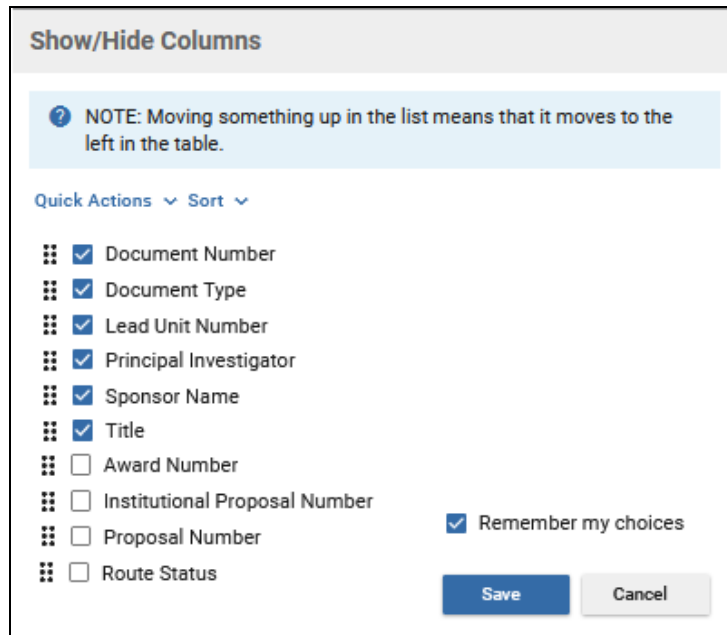
After you've performed a search, you will see a "Show/Hide Columns" button available, which allows you to select which columns you want to be visible in your search results. The button is located on the search results screen's far-right and appears only after your initial search results are displayed.



### Adding Columns

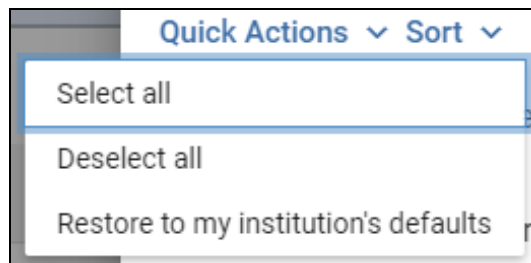
If you check a column checkbox, it will be visible in your search results. By default, "Remember my choices" at the bottom of the list is checked, which will save the columns displayed but is limited to the browser and computer you are using.

You may manually reorder your results by clicking on the six dots by a field name and dragging and dropping to the desired location.



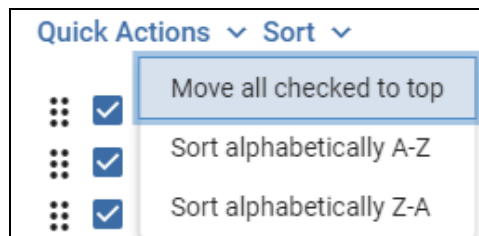
### Quick Actions

If you click on "Quick Actions," you can select or deselect all columns or restore the original defaults.



### Sort Drop-Down

Clicking on "Sort" allows you to move all the checked columns together at the top for readability or sort A-Z, Z-A. The higher a column is on the list, the more leftmost it will be in your search results.



## Multiple Rows for the Same Institute Proposal, Award, or Subaward

As ORA makes updates to records throughout the day on Institute Proposals, Awards, and Subawards your search results may show the same item twice in two unique situations. Below are a few tips to help you decide which one would be best to view, but if you're ever not sure, you can always do a full search in the appropriate module by visiting the Common Tasks page, which will show one result per record.

### Currently Being Updated

If ORA is in the process of updating a record, you will see that one item has a Route Status of "FINAL" and one item has "SAVED." You will want to view the current record in a "FINAL" route status in this case. (You can add Route Status as a column in Show/Hide Columns above your search results)

Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
<a href="#">Award</a>	Doe, Jane	USDA-Agricultural Research Service	3200001	5200321	000789-00001	FINAL
<a href="#">Award</a>	Doe, Jane	USDA-Agricultural Research Service	3610008	5200321	000789-00001	SAVED

### Recently Updated and Finalized that Day

If ORA just recently updated a record that day, you may see two results that both have a "FINAL" Route Status. In this situation, you will want to open the higher of the two Document Numbers you see listed. NOTE: This is a temporary artifact after ORA finalizes an update. A nightly process cleans these duplicate entries up, and the next day there will be only one result instead of two.

Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
<a href="#">Award</a>	Doe, John	NSF	3380001	5200123	000123-00001	FINAL
<a href="#">Award</a>	Doe, John	NSF	3955432	5200123	000123-00001	FINAL

### Search Tips!

- Use the "Search Everywhere" dropdown to limit your results by category if too many items are listed. Narrowing down results with this flexible tool will allow you to perform targeted searches.
- In your search results, click on the Column Headers to sort any column in A-Z or Z-A order.
- Based on what your criteria are, you may want to change the columns that are displayed in your results to better suit your returned results via the Show/Hide Columns button.
- Use multiple words or a phrase with quotes in the "Search Everywhere" field to narrow your search down as needed. Phrases with quotations cannot be used in Category limits.
- Using the "\*" as a wildcard to search is superfluous. You can enter a short string to simulate the same type of query within the search bar OR in a category. For example, searching "cano" will return results for "Canon", "canopies", "Canonical", etc.
- Search results do not include canceled development proposals. Use the Common Tasks page to view the Proposal Development Full Search screen and retrieve a proposal that was canceled.
- When searching by an award number, use the first six digits to pull all awards within a family or enter an award number in quotes to pull results based on that single award.
- When searching for awards by account number, keep in mind some account numbers were reused in the past but only one would have an Active Status at any single time while all others are Closed.

## Column Suggestions

After performing searches, you may feel that you are missing some key fields that would help you differentiate records from each other, or you may find it challenging to understand why you are getting certain results. Adding more fields to display in your search results with the “Show/Hide Columns” tool can help in successfully navigating your returned results. We have listed some suggestions below based on the document type. You can mix and match or use any of the other available fields to suit your needs better.

### Awards

- Document Type
- Account Id
- Award Number
- Sponsor Number
- Lead Unit Number
- Principal Investigator
- Sponsor Name
- Title
- Start Date
- End Date
- Status
- Route Status
- Document Number

### Institute Proposals

- Document Type
- Institutional Proposal Number
- Lead Unit Number
- Principal Investigator
- Sponsor Name
- Title
- Start Date
- End Date
- Status
- Route Status
- Document Number

### Subawards

- Document Type
- PO Number
- Subaward Id
- Subrecipient
- Requisitioner
- Lead Unit Number
- Title
- Start Date
- End Date
- Status
- Route Status
- Document Number

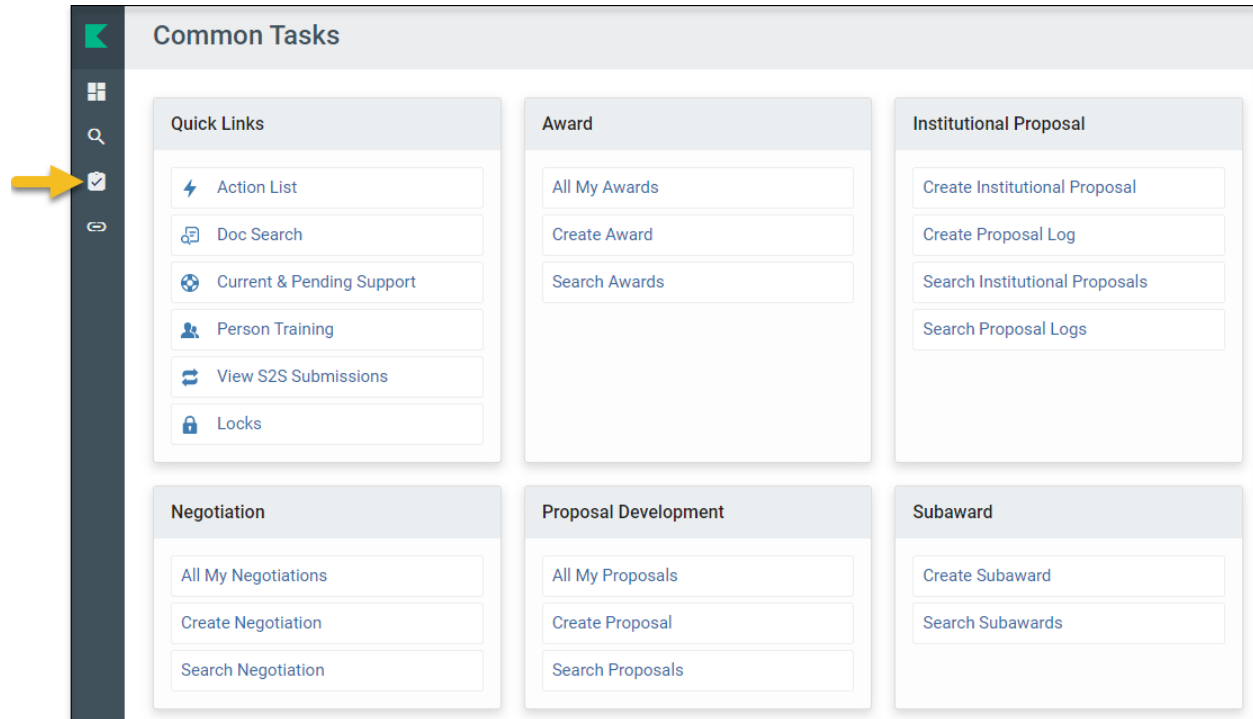
### Development Proposals

- Document Type
- Proposal Number
- Lead Unit Number
- Principal Investigator
- Sponsor Name
- Title
- Start Date
- End Date
- Status
- Deadline Date
- Document Number

*NOTE: Sponsor Number is the Sponsor Award ID.*

# Commons Tasks

The Commons Tasks page displays panels specific to each Kualu Research module (Award, Institutional Proposal, Subaward, and Proposal Development) as well as a Quick Links panel. For each, you will find the most common tasks for that module, which includes search links to access the traditional full search pages. While links to each task are visible to everyone, only people with authorized access to create or view certain records will be able to do so.



## Quick Links

- Action List - Allows you to view your Action List, which contains requests for approval, proposal certification requests, FYIs, and other items.
- Doc Search - Allows you to search for any record by the document number.
- Current & Pending Support - Allows you to do a Current or Pending Report for any investigator. After selecting a person, click "Initiate Report," then choose an Export option at the bottom. You may alternatively select the "Print" option to generate a PDF of each.
- Person Training - Not used at UMD.
- View S2S Submissions - Allows you to search Proposal Development System-to-System submissions.
- Locks - Allows users who can create or edit records to search for locks left on open records.
  - NOTE: As a proposal development creator, when you edit a proposal, you create a lock. This lock prevents other proposal creators in your department from editing the proposal while you are working on it. This is called a "Pessimistic Lock" in Kualu Research. Locks can remain in the system if you don't click the "Close" button on a Prop Dev record after editing it, but you may clear the lock using the Pessimistic Lock search.

## **Award**

- All My Awards - Initiates a full search of awards where you are listed as the PI, CO-I, or Key Person.
- Create Award - For ORA use.
- Search Awards - Allows you to use the Full Search page to search for Award records.

## **Institutional Proposal**

- Create Institutional Proposal - For ORA use.
- Create Proposal Log - Not used at UMD.
- Search Institutional Proposals - Allows you to use the Full Search page to search for Institutional Proposal records.
- Search Proposal Logs - Not used at UMD.

## **Negotiation** - For ORA use.

## **Proposal Development**

- All My Proposals - Initiates a full search of Proposal Development records where you are a Participant (person listed in the Access section of a Prop Dev record). This may be useful for proposal creators to identify proposals they've initiated.
  - NOTE: If you are interested in finding proposals where you are a PI, CO-I, or Key Person role on a proposal, you may move your username to the "Proposal Person" search field instead and search again.
- Create Proposal - Allows you to create a Proposal Development record (only for the Proposal Creators aka Aggregators).
- Search Proposals - Allows you to use the Full Search page to search for Prop Dev records.

## **Subaward**

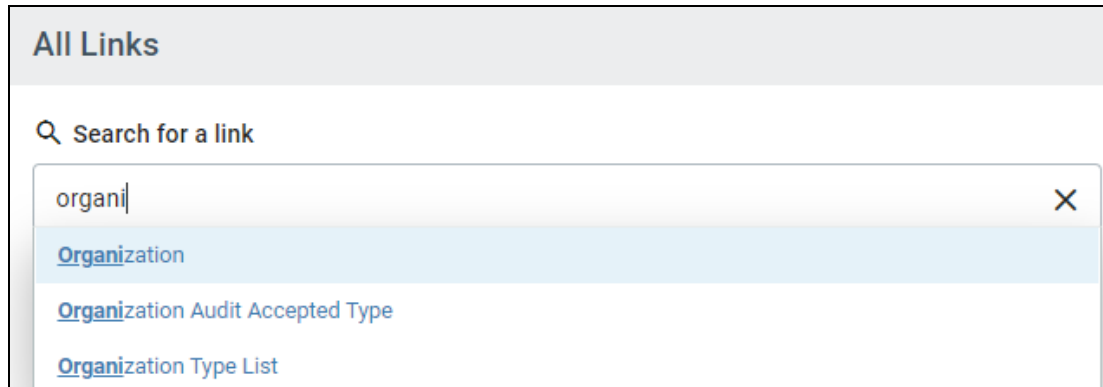
- Create Subaward - For ORA use.
- Search Subawards - Allows you to use the Full Search page to search for Subaward records.



# All Links

The All Links page allows you to access a large assortment of links which include common lookups for Sponsors, Organizations, and Address Book tables. It can also be used to access the same Kualu Research module links found on the Common Tasks page. All of the links are organized by category and contained in expandable panels. While all links are visible to every user, only users with authorized access will be able to view and edit certain records.

If you have an idea of what you are looking for, the easiest option may be to type a keyword into the “Search for a Link” field. It will auto-populate results based on the text you enter.





## Quick Tip!

To access these common lookup tables simply type in their names in the “Search for a Link” field. These are also located under the Shared Across Modules and System Admin Panels.

- Sponsor
- Organization
- Address Book

## Link Panels

You may alternatively look for a link manually within each panel using the Category title as a guide.

- To expand each panel and display the links click on the down icon .
- To collapse each panel and hide links in that section click on the up icon .
- You will notice as you expand each additional section that previous sections you opened will automatically be collapsed.

## Common Links

Below are a list of the most commonly used links:

### Award

- All My Awards - Initiates a full search of awards where you are listed as the PI, CO-I or Key Person.
- Search Awards - Allows you to use the Full Search page to search for Award records.

### Institutional Proposal

- Search Institutional Proposals - Allows you to use the Full Search page to search for Institutional Proposal records.

## **Miscellaneous**

- Action List - Allows you to view your Action List where you will find requests for approval, proposal certification requests, FYIs, and other items.
- Current & Pending Support - Allows you to do a Current or Pending Report for any investigator. After selecting a person, click "Initiate Report" then you may select an Export option at the bottom. You may alternatively select the "Print" option to generate a PDF of each.
- Current locks - Allows you to search for one's Pessimistic Lock.
- Doc Search - Allows you to search for any record by the document number.
- Locks - Allows you to search for your Pessimistic Locks.
- Sponsor - Allows you to search the Sponsor lookup table.
- Unit - Allows you to search for any unit number/name.
- Unit Hierarchy - Allows you to view the unit organization between departments and colleges.

**Negotiation** - ORA use only.

## **Proposal Development**

- All My Proposals - Initiates a full search of Proposal Development records where you are listed as a Participant (person listed in the Access section of a Prop Dev record). This may be useful for proposal creators to identify proposals they've initiated.
- Create Proposal - Allows you to create a Proposal Development record (only for the Proposal Creators aka Aggregators).
- Proposals Enroute - Allows you to perform a search for Prop Dev records that are in the review/approval process (Approval in Progress, Approval Pending..., etc.)
- Search Proposals - Allows you to use the Full Search page to search for Prop Dev records.

## **Shared Across Modules**

- Address Book - Allows you to search the Address Book table where Proposal Creators add Non Employees and Performance Sites for use on Prop Dev records. This lookup provides an edit option within your search results should you need to update an address book record you created.
- Organization - Allows you to search the Organizations (aka Subawardee) lookup table.

## **Subaward**

- Search Subawards - Allows you to use the Full Search page to search for Subaward records.

## **System Admin**

- Organization - Allows you to search the Organizations (aka Subawardee) lookup table.
- Pessimistic Locks - Allows you to search for your Pessimistic Locks.
- Sponsor - Allows you to search the Sponsor lookup table.

# FAQs

## Dashboard Page

1. My dashboard cards are all blank; what do I do?  
If your dashboard cards are all empty, it could mean either that you don't have proposal development permissions or that you don't have any legitimate proposals in progress or in the approval process. If you are a proposal viewer, approver, or creator and believe you should see records in the dashboard cards, please contact [kr-help@umd.edu](mailto:kr-help@umd.edu).
2. Why does a proposal still show up in the Proposals Routing to Me card after I approved it?  
There are two reasons why a proposal may still be displayed after approving:
  - You may also be an approver at another approval stop on the proposal.
  - The Dashboard home page may need to be refreshed. While the Dashboard home page automatically refreshes every five minutes, you may click on your web browser's refresh button or use shortcut keys (Shortcut Keys: "F5" in Windows, "Command" + "R" on Macs) to manually refresh.
3. How do I get rid of old, abandoned, or unwanted proposals in my dashboard cards?  
If you are certain there are no intentions to submit the proposals and are authorized to do so, you may cancel each proposal to inactivate them and hide them from view.  
We recommend that you edit the proposal and prefix the title with a "DO NOT USE" in the title, so it's clear that you have abandoned it in the event you come across it in the future. The "Cancel" button is located on the Summary/Submit page of the proposal and can only be performed on proposals that are neither routed for approval nor already submitted.

**NOTE: Cancelling WILL inactivate your proposal, and you will no longer be able to edit it. If you cancel a proposal by accident, you may copy the proposal to retrieve and edit it again.**

## Search Records Page

- How can I limit the results shown in Search Records?
  - Option 1 - Add in additional keywords to the search box.
  - Option 2 - Narrow searches by clicking on the "Search everywhere" drop-down and selecting a search category. Then enter the desired text for that category in the search bar and click "Go" or hit enter, which will apply your search variable and limit your results. Repeat the process to limit your results further.
  - Option 3 - Limit search results by excluding keywords from your search using the minus character "-" (e.g., apple -computer) or using a phrase (e.g. "apple tree")
- What columns do you recommend when using the "Search Records" page to retrieve a wide variety of results?

The Show/Hide Columns tool is used to add and remove columns and re-order their layout. Below are some recommendations, but feel free to experiment to find what works best for you.

Suggested Columns	Type/Module
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Document Number</li> <li><input checked="" type="checkbox"/> Document Type</li> <li><input checked="" type="checkbox"/> Lead Unit Number</li> <li><input checked="" type="checkbox"/> Principal Investigator</li> <li><input checked="" type="checkbox"/> Sponsor Name</li> <li><input checked="" type="checkbox"/> Title</li> </ul>	All Defaults (all cross-module)
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Start Date</li> <li><input checked="" type="checkbox"/> End Date</li> <li><input checked="" type="checkbox"/> Status</li> <li><input checked="" type="checkbox"/> Route Status</li> </ul>	More Cross-Module
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Account Id</li> <li><input checked="" type="checkbox"/> Award Number</li> <li><input checked="" type="checkbox"/> Sponsor Number</li> </ul>	Awards
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Institutional Proposal Number</li> </ul>	Institutional Proposals
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PO Number</li> <li><input checked="" type="checkbox"/> Subaward Id</li> <li><input checked="" type="checkbox"/> Subrecipient</li> </ul>	Subwards
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Development Proposal Number</li> <li><input checked="" type="checkbox"/> Deadline Date</li> </ul>	Proposal Development

- I tried to look up an award number (e.g., 123456-00001) on the "Search Records" page, but the system showed 10,000 results. Why is this happening?

The hyphen in the award number confuses the search so you can either....

- Enter an award number in quotes (e.g., "123456-00001") to pull results for just that number
- OR

- Remove the hyphen (e.g., 123456 00001) in the award number to pull the award.
4. I'm trying to limit my results on the "Search Records" page by excluding a phrase, and it's not working?  
You cannot currently exclude a phrase on the "Search Records" page (e.g., -"apple tree"). Try excluding each word without the quotations or limiting your results with search categories by clicking on the "Search Everywhere" button.
  5. Why does the system display duplicate records in my search results?  
As ORA updates records throughout the day on Institute Proposals, Awards, and Subawards, your search results may show the same item twice. Either the record is currently being updated, or it was just recently updated that day. You may use the traditional full search if you're not sure or use these tips below to look at the most current and finalized record.

### Final and Saved

If ORA is updating a record, you will see one has a Route Status of "FINAL," and one has "SAVED."

View the record that is currently in the "FINAL" route status.

Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
<a href="#">Award</a>	Doe, Jane	USDA-Agricultural Research Service	3200001	5200321	000789-00001	FINAL
<a href="#">Award</a>	Doe, Jane	USDA-Agricultural Research Service	3610008	5200321	000789-00001	SAVED

### Two Final

If ORA just recently updated a record that day, you may see two results that both have the "FINAL" Route Status. View the higher of the Document Numbers you see listed here.

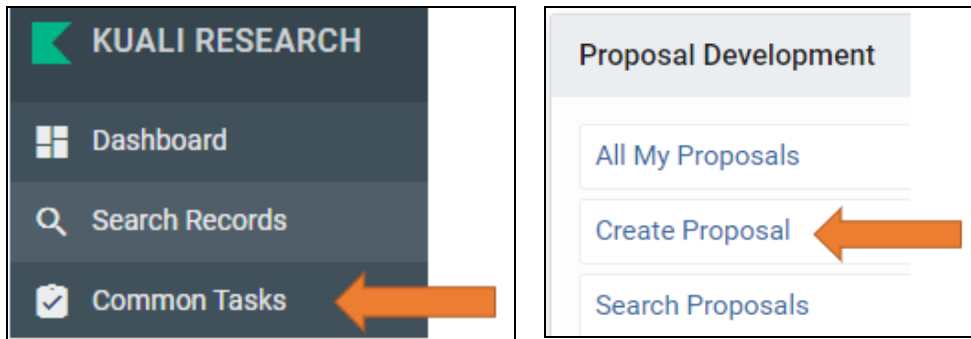
Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
<a href="#">Award</a>	Doe, John	NSF	3380001	5200123	000123-00001	FINAL
<a href="#">Award</a>	Doe, John	NSF	3955432	5200123	000123-00001	FINAL

6. Why am I getting a strange error on the "Search Records" page?  
(ERROR: \$search\_phase\_execution\_exception)  
You cannot use capitalized operators like "AND" and "OR." Review your search and remove capitalized instances of these or make them lower-case.
7. Why am I getting no results on the "Search Records" page when I know I should be?  
If you are trying to use a search operator like the "|" to perform an "OR" search, you will not be able to do so using this tool. While the search operator works successfully in full search, it is not compatible with the "Search Records" page.

# Dashboard QuickStart Questions

## 1. Where is the option to create a new Proposal Development record?

It is located in Common Tasks (from the Navigation bar on the left)



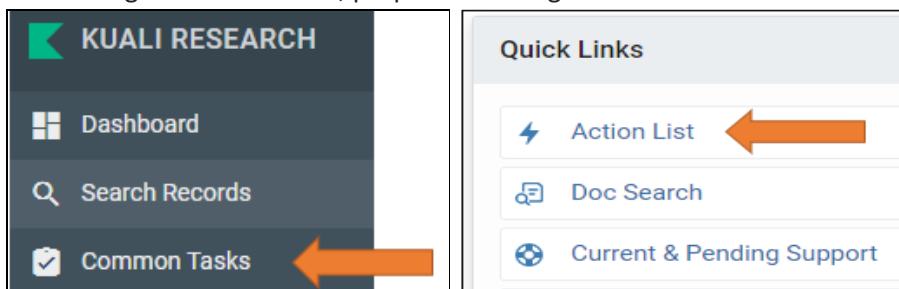
## 2. Where can I access my Action List?

The Action List is on both the Dashboard page and still available in its traditional view via the Commons Tasks page.


On the Dashboard, Approvers can monitor routed proposals' progress awaiting their approval on the Proposals Routing to Me card.



For Investigator Certification, proposals waiting to be certified are located in your Action List.




**3. I clicked on User on the Navigation bar, and now I am lost. How do I get back to the Dashboard Home page?**

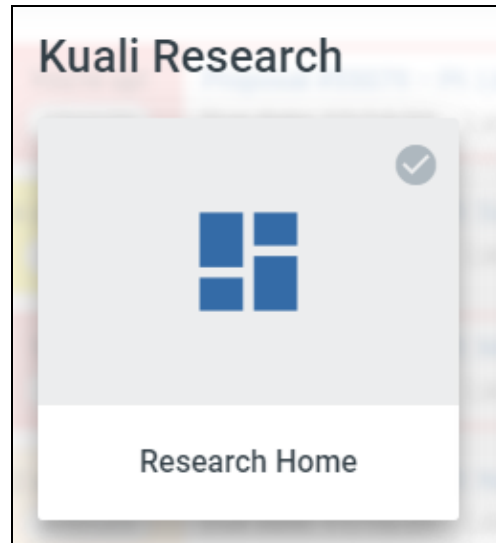
If you accidentally click on the User icon  in the Navigation Bar, a new web browser tab will open and show your user information.

To get back to Kualu Research:

You may close this tab and go back to the previous tab you had open with Kualu Research.

**OR**

1. Click on the "Switch Apps" icon  at the bottom of the navigation bar.
2. Then click on the "Research Home" tile. This will return you to the Dashboard Home page.



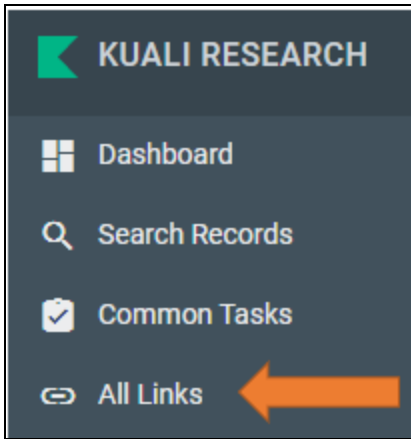
**5. The "Search Records" page isn't showing me what I want. Where can I find the full search pages I'm used to seeing?**

The full search modules are located in Common Tasks.



6. Where can I find Sponsor, Address Book, and Organization Lookup?

These tables are now accessible from the All Links page.



Type in the word address, sponsor, or organization into the “Search for a Link” field. You will start to see results based on the text you enter. Click on the desired link.

