



Kuali Research Dashboard: Overview of Features

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Last updated: 11/11/24

Table of Contents

Kuali Research Dashboard	3
Dashboard Home Page	3
Dashboard Cards	5
Proposals Routing to Me Card	5
Proposals Not Routing Card	6
Proposal Workload Card	7
Search Records Page	8
Commons Tasks	10
All Links	13
FAQs	15
Dashboard QuickStart Questions	18

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.

The screenshot shows the Kuali Research Dashboard Home Page. On the left is a dark navigation bar with the following items: KUALI RESEARCH, Dashboard, Search Records, Common Tasks, All Links, Reports, Configuration, Help, About, Logout, Miller, Carolyn LaLumiere, Switch Apps, and Collapse Menu. The main content area is titled 'Dashboard' and contains three cards: 'Proposals routing to me', 'Proposals not routing', and 'Proposal workload assignments'. The 'Proposals routing to me' card shows two proposals with 'You're up!' and 'Alternate' buttons. The 'Proposals not routing' card shows a list of proposals with details like 'Proposal #85445 - Pt: Fall, D/By - Sponsor: NASA - Management Office - Title: DF - test proposal f...'. The 'Proposal workload assignments' card is a table with columns: Proposal Number, Principal Investigator, Sponsor, Lead Unit, Title, Due Date, Last Action, Current Request(s), and Assigned Approver. Annotations include 'Navigation Bar' pointing to the left sidebar, 'Filter' pointing to filter buttons on the cards, 'Cards' pointing to the three main content cards, and 'Expand/Collapse' pointing to the Collapse Menu button in the navigation bar.

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.

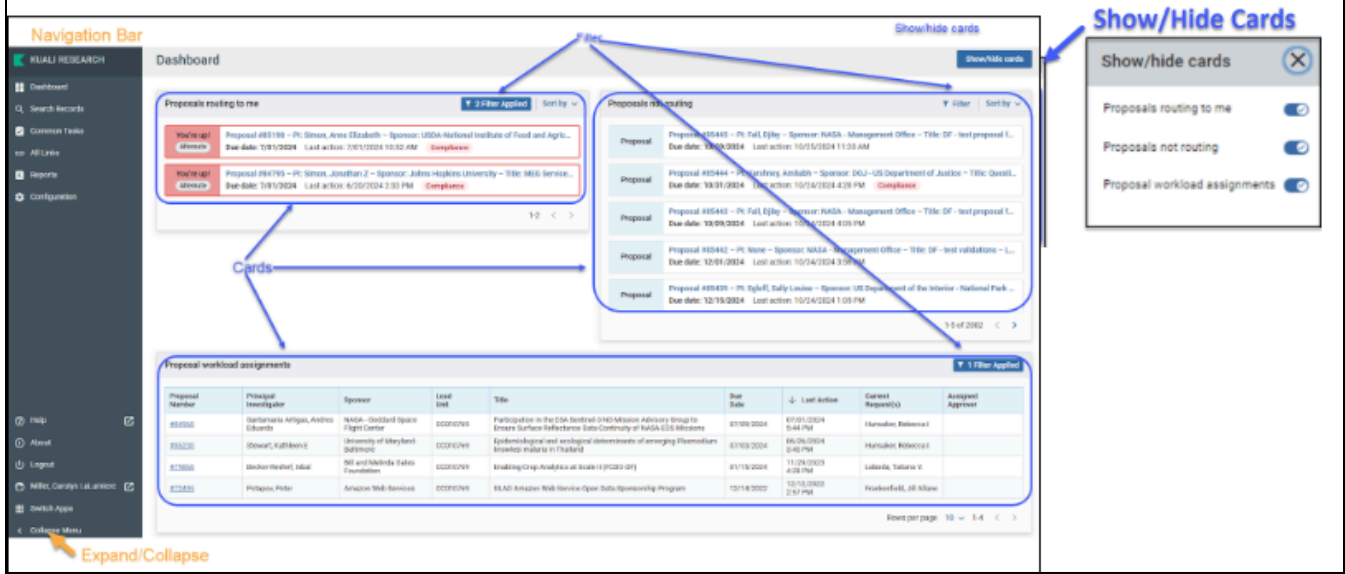
Navigation Bar

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 common tasks.
 Help	Opens a new window with a generic help guide. Please use the customized UMD-provided guides found on the ORA website here: Kuali Research Resources
 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.

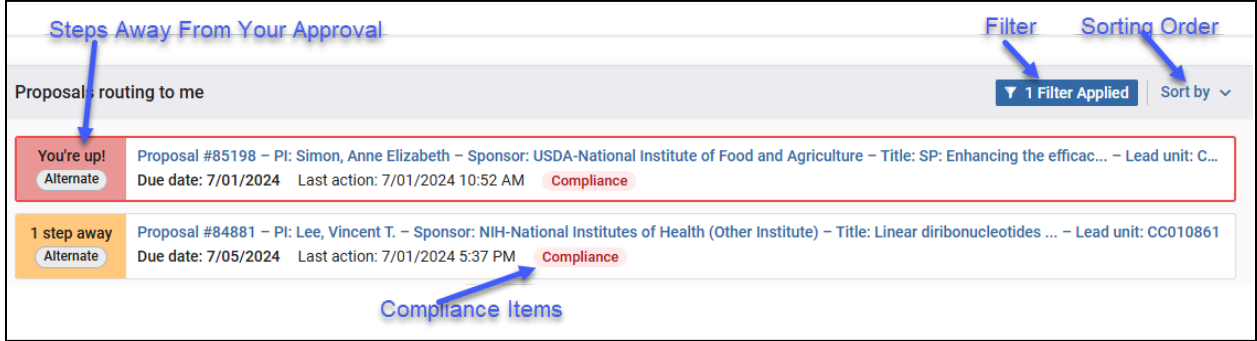
Dashboard Cards

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.

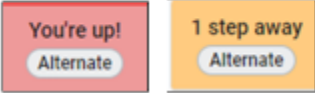


Proposals Routing to Me Card

This card allows Proposal Development Approvers to easily monitor proposals that are queued up for their approval and watch for proposals they will soon have to approve. The colored “steps” tab shows you proposals that are available for your immediate approval or if it’s one or more steps away. The details for each entry shows 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 will also be removed from the card.



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



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 the 'Proposals not routing' card interface. At the top, there are 'Filters' and 'Sorting Options' labels. The card displays a list of proposals with details such as PI, Sponsor, Title, Due date, and Last action. A 'Compliance' tag is visible on the second proposal. A 'Filters' dropdown is open, showing '1 Filter Applied' and 'Sort by' options. The 'Sort by' dropdown is expanded, showing 'Ascending' and 'Descending' radio buttons, and a list of sorting criteria: 'Deadline Date', 'Last Action Taken Date', 'Principal Investigator', 'Proposal Number', and 'Sponsor Name'. A 'Compliance Items' tag is also visible, with a 'View Additional Records' button below it. The bottom right shows '6-10 of 439' records and navigation arrows.

Proposal Routing Card Features

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

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 full 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 the proposal creator didn't add a deadline date, 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 steps. 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.

Proposal workload assignments

Filters 2 Filter Applied

Click Any Column Header to Sort

Prop. #	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#98275	Quintos Alonso, Beatriz Eugenia	National Science Foundation	CC010874	CAREGIVERS AND TEACHERS AS RESEARCHERS (CANTAR): Community-Based Participatory Research on Language Practices to Catalyze Mathematics Learning	11/13/2024	11/08/2024 9:40 AM	Mix, Kelly S.	
#98245	Park, Julie J.	National Center for Education Statistics	CC010875	IES RUDL: Asian Undergraduate Student Load Borrowers	11/08/2024	11/05/2024 1:52 PM	Egloff, Sally	
#98240	Ricotti, Massimo	National Science Foundation	CC010838	Radiation-Hydrodynamic Simulations on GPUs of Galaxy-Supermassive Black Hole Co-evolution and Cosmic Reionization	11/15/2024	11/04/2024 3:40 PM	Egloff, Sally	
#98235	Weintrop, David	National Science Foundation	CC010874	From Data to Models and Back: Empowering K-12 Science Classrooms with Agent-Based Modeling and Data Science	11/13/2024	11/05/2024 1:46 PM	Egloff, Sally	
#98217	Bescho, Naoki	National Science Foundation	CC010838	Impact of waves and turbulence on ion heating and acceleration during magnetic reconnection	11/18/2024	11/04/2024 11:37 AM	Egloff, Sally	
#98213	Ricotti, Massimo	National Science Foundation	CC010838	Observations and Analysis of Stellar Halos in Dwarf Galaxies: WLM as a Case Study	11/15/2024	11/01/2024 4:00 PM	Egloff, Sally	
#98202	Phaneuf, Raymond J.	National Science Foundation	CC010924	Probing the Degree of 3D Island Coalescence in ALD of Alumina and in Subsequent Plasma Annealing via the Interaction of the Films with Water	11/08/2024	11/07/2024 2:06 PM	Egloff, Sally	
#98196	Diemer, Benedikt	National Science Foundation	CC010838	Collaborative Research: CDS&E: Turning Galaxy Clusters into Cosmological Laboratories with Interpretable Machine Learning	11/12/2024	11/01/2024 4:13 PM	Egloff, Sally	
#98143	Wilson, Michelle Elizabeth	National Science Foundation	CC010557	EAGER Proposal to implement the PASS platform at the University of Maryland and expand its utility in research data sharing	11/12/2024	11/01/2024 5:40 PM	Egloff, Sally	
#98104	Piccoli, Philip	National Science Foundation	CC010843	MRI Track #1. Acquisition of a State of the Art Electron Probe Microanalyzer	11/12/2024	11/04/2024 3:01 PM	Egloff, Sally	

Click Proposal Number to Open Record

Rows per page 10 1-10 of 47

Increase Rows Viewable per Page View Additional Records

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 titled "Search Records". On the left, there is a dropdown menu labeled "Search everywhere". The main input field contains the placeholder text "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., GR ID GR099091 and GR889301)
- Keep in mind, when performing a search, it may return results that contain only a portion of that value (e.g., searching appl and will match with apple).

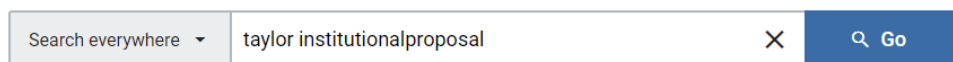
Below are some example of simple searches:

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



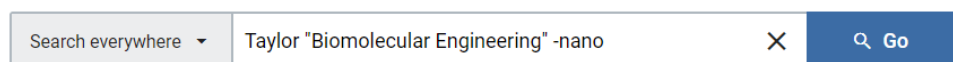
A search bar with a dropdown menu labeled "Search everywhere" and the text "Taylor" entered. There is a clear button (X) and a blue "Go" button.

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



A search bar with a dropdown menu labeled "Search everywhere" and the text "taylor institutionalproposal" entered. There is a clear button (X) and a blue "Go" button.

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



A search bar with a dropdown menu labeled "Search everywhere" and the text "Taylor 'Biomolecular Engineering' -nano" entered. There is a clear button (X) and a blue "Go" button.

Search for award numbers using quotes or removing dash (otherwise, the search will misinterpret the "-").



A search bar with a dropdown menu labeled "Search everywhere" and the text "'300734-00002'" entered. There is a clear button (X) and a blue "Go" button.

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



A search bar with a dropdown menu labeled "Search everywhere" and the text "300734" entered. There is a clear button (X) and a blue "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				
Award Number	Date Created	Account Id	Award Number	Lead Unit	Previous Grants.gov Tracking Id	Special Review Type
Lead Unit	Date Last Action Taken	Activity Location	CFDA Number	Namespace	Primary Approvers	Sponsor
Personnel	Deadline Date	Activity Type	Days Until Next Deadline	Negotiation Activity Last Modifier Name	Prime Sponsor	Sponsor Number
Principal Investigator	End Date	Administrators	Development Proposal Number	Negotiation Activity Location	Principal Investigator	Status
Proposal Number	Execution Date	Agency Routing Id	Document Number	Negotiation Activity Number of Days	Principal Investigator Id	Subaward Id
Sponsor	Follow-Up Date	Agreement Type	Document Title	Negotiation Activity Type	Program Announcement	Title
	Negotiation Activity Follow-Up Date	Approval Priority Stop	Document Type	Negotiation Id	Proposal Number	Total Budget Proposal Amount
	Start Date	Approval Type	Hierarchy Child	Negotiator	Requisitioner	Total Obligated Award Amount
		Approver	Hierarchy Route Status	Opportunity Id	Route Status	Type
		Assigned Approver	Initiator	PO Number	Sequence Status	View Units
		Associated Document Number	Institutional Proposal Number	Parent Proposal Number	Site Investigator	
		Association Type	Last Action User	Personnel	Special Review Status	

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

Search Lead Unit CC010095 Go

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

Search everywhere Type something... Go

Lead Unit: CC010095 Clear All Saved Searches

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: CC010095 Document Type: Award Clear All Saved Searches

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 More options

[Lead Unit](#) [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.

A rectangular button with a blue circular icon containing a white gear symbol, followed by the text "Show/Hide Columns" in blue.

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.

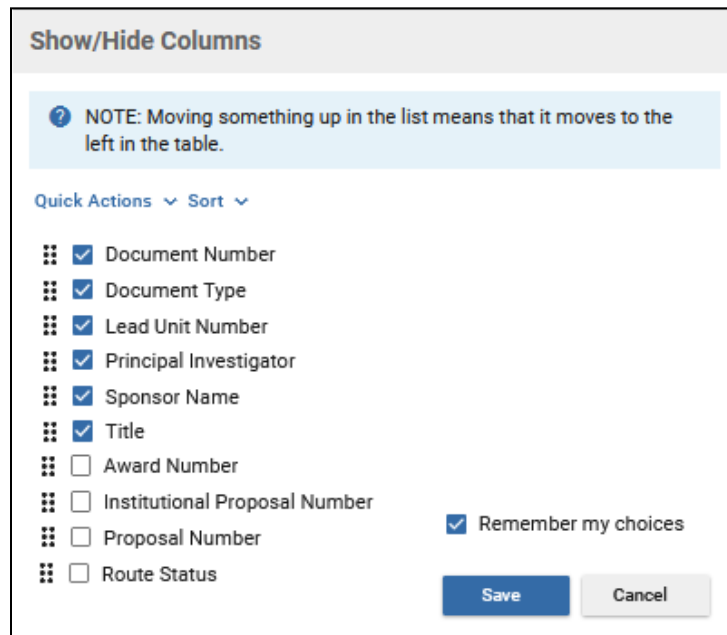
You may manually reorder your results by clicking on the six dots  by a field name and dragging and dropping to the desired location.

Quick Actions

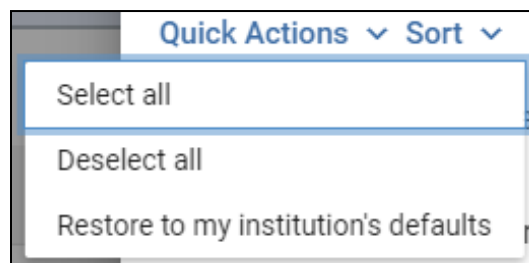
If you click on "Quick Actions," you can select or deselect all columns or restore the original defaults.

Sort Drop-Down

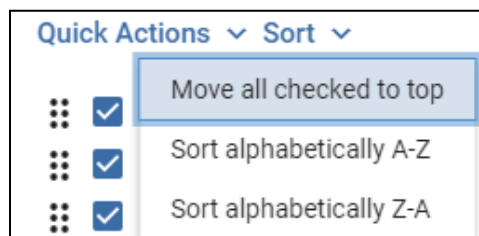
Clicking on "Sort" allows you to move all the checked columns together at the top for readability or sort A-Z, Z-A. The higher a column is on the list, the more leftmost it will be in your search results.



The "Show/Hide Columns" dialog box features a title bar, a light blue note box with a question mark icon stating "NOTE: Moving something up in the list means that it moves to the left in the table.", and two dropdown menus labeled "Quick Actions" and "Sort". Below these are ten items, each with a six-dot icon and a checkbox: Document Number, Document Type, Lead Unit Number, Principal Investigator, Sponsor Name, Title, Award Number, Institutional Proposal Number, Proposal Number, and Route Status. A "Remember my choices" checkbox is checked. At the bottom right are "Save" and "Cancel" buttons.



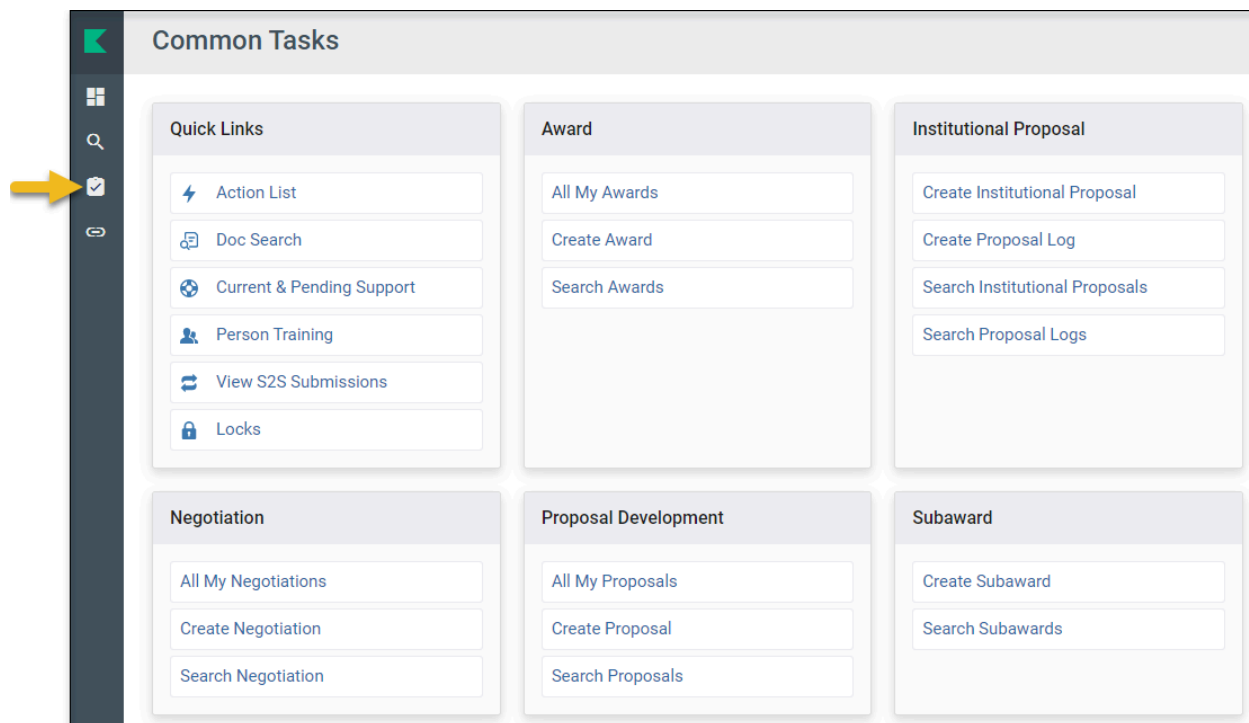
The "Quick Actions" dropdown menu is open, showing three options: "Select all", "Deselect all", and "Restore to my institution's defaults".



The "Sort" dropdown menu is open, showing three options: "Move all checked to top", "Sort alphabetically A-Z", and "Sort alphabetically Z-A".

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.

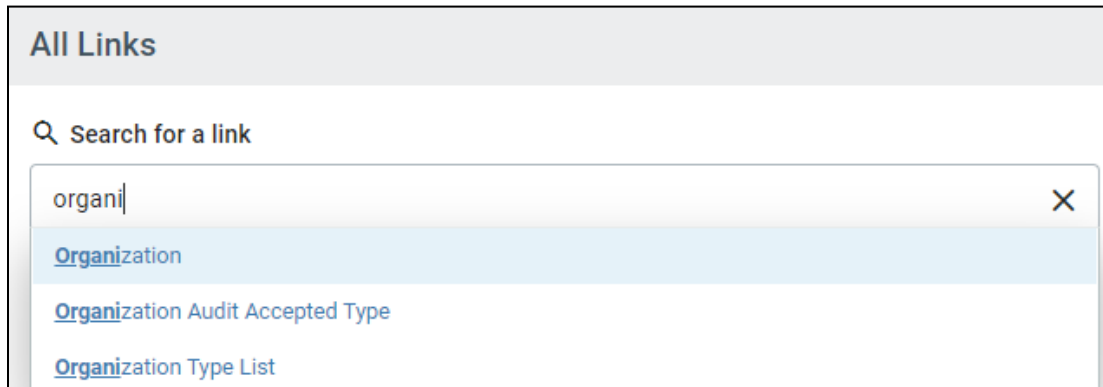
Subaward

- 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.

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: Canceling 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"> <input checked="" type="checkbox"/> Document Number <input checked="" type="checkbox"/> Document Type <input checked="" type="checkbox"/> Lead Unit Number <input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Sponsor Name <input checked="" type="checkbox"/> Title 	All Defaults (all cross-module)
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Start Date <input checked="" type="checkbox"/> End Date <input checked="" type="checkbox"/> Status <input checked="" type="checkbox"/> Route Status 	More Cross-Module
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Account Id <input checked="" type="checkbox"/> Award Number <input checked="" type="checkbox"/> Sponsor Number 	Awards
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Institutional Proposal Number 	Institutional Proposals
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> PO Number <input checked="" type="checkbox"/> Subaward Id <input checked="" type="checkbox"/> Subrecipient 	Subwards
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Development Proposal Number <input checked="" type="checkbox"/> Deadline Date 	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	Award Number	Route Status
Award	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033230	312266-00001	FINAL
Award	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033231	312266-00001	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.

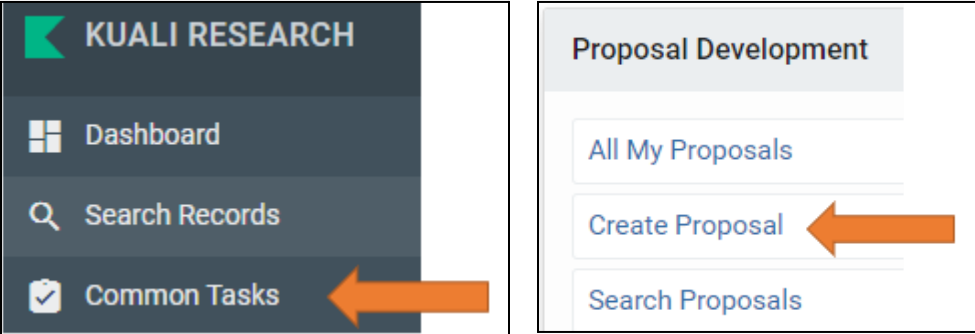
Document Type	Principal Investigator	Sponsor Name	Document Number	Award Number	Route Status
Award	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033230	312266-00001	FINAL
Award	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033231	312266-00001	FINAL

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)



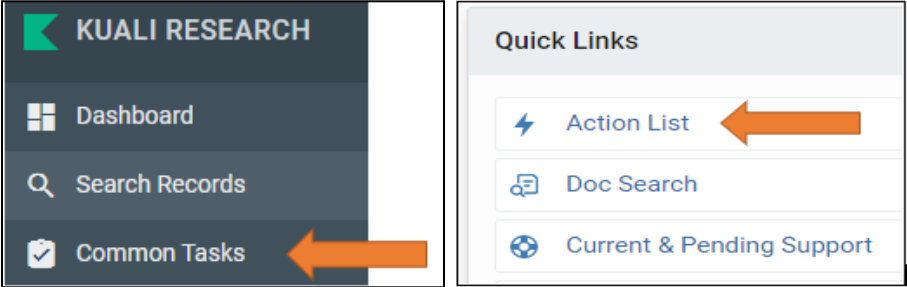
2. Where can I access my Action List?

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?

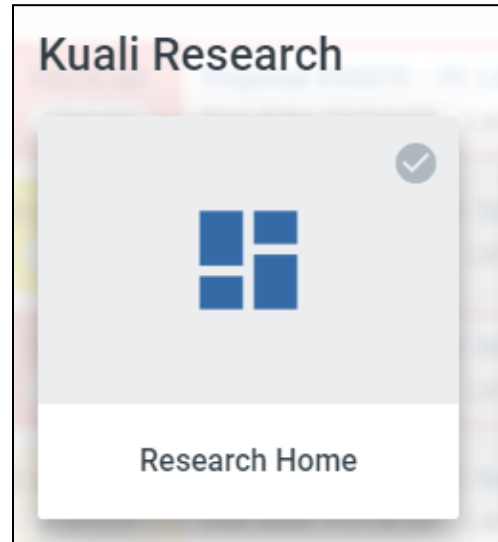
If you accidentally click on the User icon  in the Navigation Bar, a new web browser tab will open and show your user information.

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.



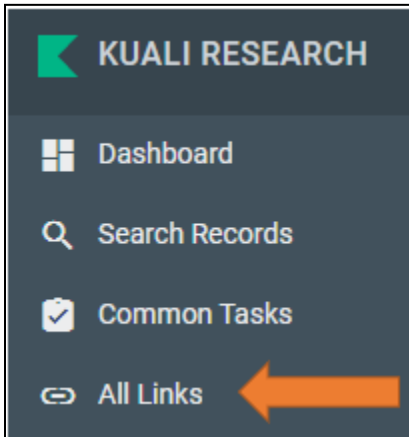
5. The "Search Records" page isn't showing me what I want. Where can I find the full search pages I'm used to seeing?

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.

