



## Navigation in Kuali Research

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# Table of Contents

<b>Navigation in Kuali Research</b>	<b>3</b>
<b>Kuali Research Dashboard</b>	<b>3</b>
<b>Common Tasks - Lookup Screen Search Techniques</b>	<b>9</b>
<b>Search Records Page</b>	<b>12</b>

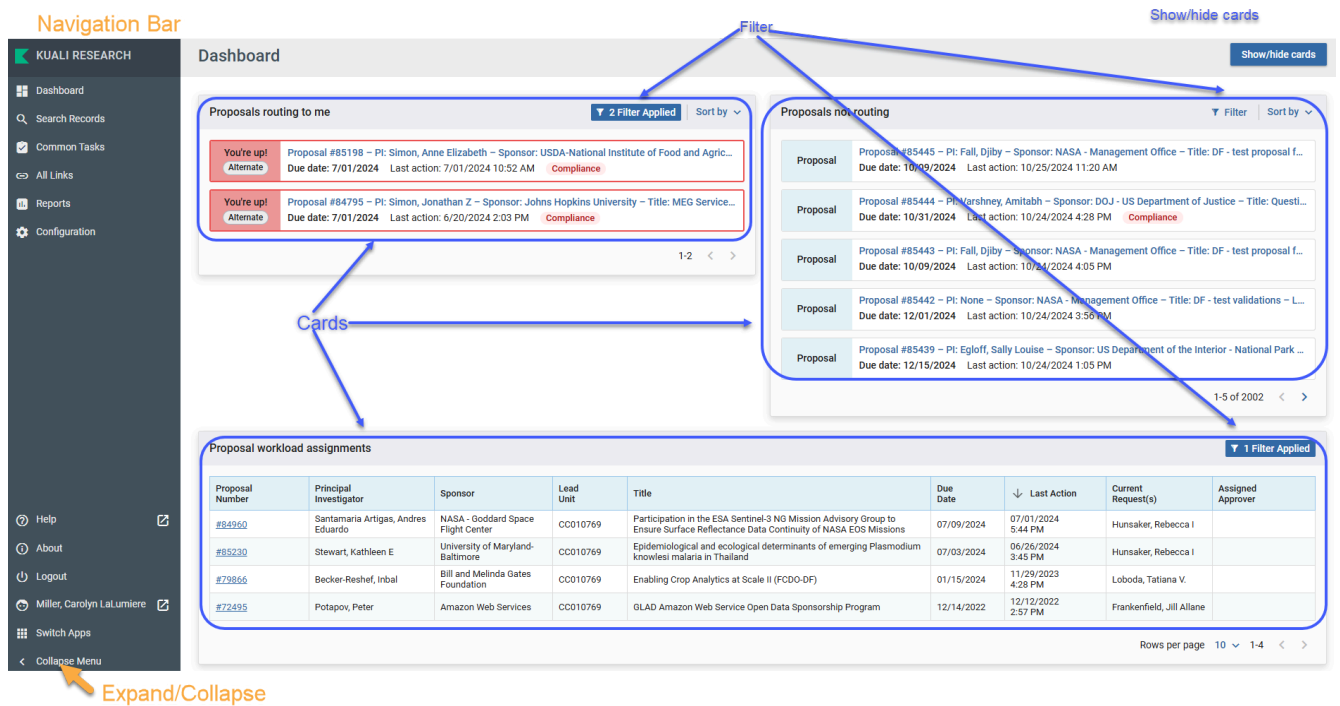
# Navigation in Kual Research

## 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 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.



### Dashboard Cards

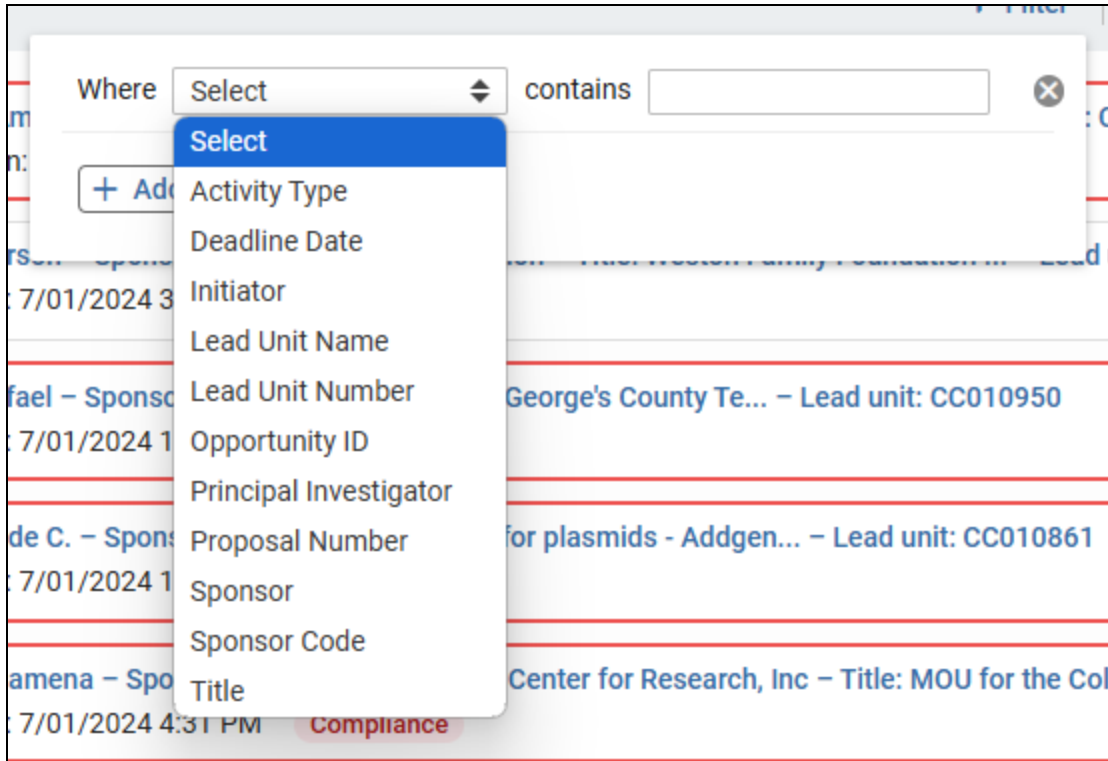
There are three dashboard cards that all relate to Proposal Development. Within each card, you may click on an item to open the record.


### Collapse Menu

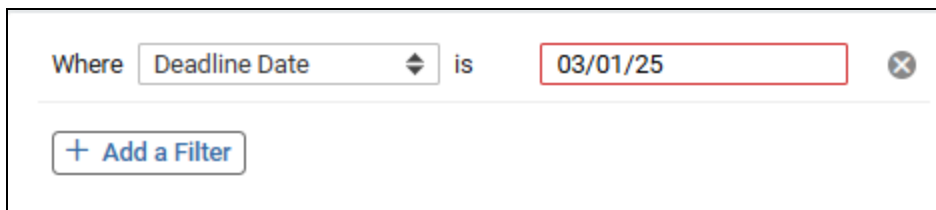
Collapse Menu (located in the lower left corner) allows you to expand the navigation bar to display the descriptions for each icon. This is helpful to familiarize yourself with the Dashboard Home page, and you may choose to collapse the bar later and simply show the icons if you would like more screen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

### Filter

The filter allows you to limit the items shown in the dashboard card based on criteria you have selected. When you click on Filter, you will see a dropdown list of items for filtering.














Select the item you want to filter on and type in the date desired for that item. The filter is automatically added. You can click on Add a Filter to add an additional filter. To remove a filter, click on the  on the filter line.



**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 Kuali Research.

 Dashboard	Returns to the Dashboard Home page.
 Search Records	Search provides an 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, which includes accessing full searches for each module, creating new records, and has 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: <a href="#">Kuali Research Resources</a>
 About	Lists the current version of Kuali Research.
 Logout	Allows you to log out of Kuali 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 back to your previous tab. You may also return back to Kuali Research by clicking on Switch Apps > Research Home.
 Switch Apps	Allows you to switch to different apps in the Kuali Suite. Please only use the Research Home and return to Kuali 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.

# Common Tasks - Module Lookup Screens

Each module lookup screen contains various criteria to search on. See [Common Tasks - Lookup Screen Search Techniques](#) for specifics on how to search. There are three buttons at the bottom of the search screen.



- Search – performs search based on search criteria
- Clear – clears previously typed search criteria
- Cancel – returns to Kualu Research Dashboard page

## Module Lookup Results List

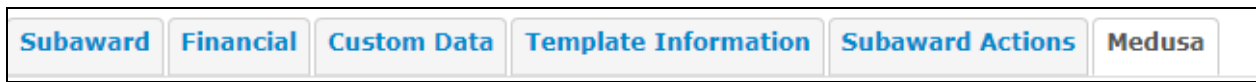
When you click on search, the results list is displayed at the bottom of the lookup screen. If the item you are looking for is not in the results list, you can do another search from this screen.

One item retrieved.	
<b>Actions</b>	<b>Requisitioner</b>
<a href="#">open</a> <a href="#">medusa</a>	Jason Michael Strahan

Click on open to view the details of the item. Or click on Medusa to see the information on related items. To open a new window, do a CTRL/Open or right-click on Open.

# Module Detail Screen

## Tabs



Click on a tab to see the details for that tab.

## Expand All/Collapse All

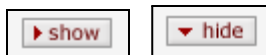


Within each tab, there are expand all and collapse all buttons at the far right.

Expand all – shows the details for all of the panels on that tab.

Collapse all – collapses screen back to just the panel's headers for each panel.

## Show/Hide



On each panel header, there is a toggle button – Show/Hide. If the panel detail is not showing, the Show button will allow you to see the detail. If the panel detail is showing, the Hide button will close the detail for that panel.

## Close



There is a close button at the bottom of each detail screen. Clicking on close will return to the Kualu Welcome screen.

## Browser Back/Forward Arrow

You can use the back and forward arrows on your browser for navigation. Because the Close button will return you to the Kualu Welcome screen, use the back arrow to return to the previous screen.

## Detail Double Click

On any blue field, you can double-click on it to get more detail on that value.


Sponsor Code:	010496
Acronym:	NIH-HD

## Open New Tab


To keep your current window on the screen it is on, right-click on the Unit role. This will open a new tab at the same place. You can then navigate to a different section.

## Special Icons




Indicates there is more information for this item. Click on  to view the information.




Indicates that the detailed information for this item is available. Click on  to view the details. There must be a value in the field in order for this to work.



On lookup screens, the  indicates that you can do a specific search on that item and return the value to the lookup screen.



The link icon indicates that you can get the URL for this screen. Click on the  to get the URL. You can then send it in an email, etc. to others; the URL will work only for those who have permission to view the information in the link.




# Common Tasks - Lookup Screen Search Techniques

## Basic Searching

Across all the modules in Common Tasks, you may use the following techniques to perform searches on text fields.

Typing in search variables across multiple fields will act as an AND operator.

Clicking on the  next to a search field will do a secondary lookup for that particular item.

You may optionally use additional search operators below to further limit your results.

**NOTE: These do NOT apply to the all-in-one "Search Records" page.**



On this search page, you may optionally use search operators below to further limit your results.

Operator	Name	Example	Comment
*	Wildcard Any Char	Title: *apple*	Search for "apple" anywhere in the title, regardless of the number of characters
		Title: apple*	Search for "apple" at the beginning of the title
		Title *apple	Search for "apple" at the end of the title
?	Wildcard One Char	Title: ?ffect* OR Lead Unit CC01****	Search for a word that has any one character that precedes "ffect" (e.g. "affect" or "effect") in the beginning of a title OR search for all UMD items
(Vertical Bar)	OR	Lead Unit: *apple* *orange*	Search for "apple" OR "orange" in any order
&&	AND	Title: *apple*&&*honeycrisp*	Search for "apple" AND "honeycrisp" in any order
!	NOT	Title: *apple*&&!*tree*	Search for "apple" but not "tree"
..	SERIES	Lead Unit: CC010101:CC010201	Search records with Lead Unit from "CC010101" to "CC010201" (Just like combining Greater Than or Equal to and Less Than or Equal to)
>=	GREATER THAN OR EQUAL TO	Lead Unit: >=CC010005	Search records with Lead Unit Greater than or Equal to "CC010005"
>=	LESS THAN OR EQUAL TO	Lead Unit: <=CC010005	Search records with Lead Unit Less than or Equal to "CC010005"


**NOTE:** To ensure you get a complete set of UMD records returned, type in CC01\*|CC09\* in Unit ID. Due to KR logic and the results being limited to 500 records, leaving this field blank may cause KR not to return all records.


There are some older UMD development proposals (2007-2015) that have UMCP as their lead unit. To include them in your broad search, type in UMCP|CC01\*|CC09\*.

*Tip: students are included in person searches. To exclude students, type !N in the Employee Type Code field.*

For items that have a  on the right, you can click on the  to do a search on that item and return a desired value.

Sponsor ID:   



Clicking on the  leads to the Sponsor Lookup screen.

Sponsor Lookup 

Sponsor Code:

Sponsor Name:

Acronym:



Sponsor Type Code:   

DUN And Bradstreet Number:

DUNS Plus Four Number:

DODAC Number:

CAGE Number:

Postal Code:   

When a search is completed, the results list shows at the bottom of the screen.

34 items retrieved, displaying all items.


Return Value	Sponsor Code	Sponsor Name	Acronym
<a href="#">return value</a>	012173	NIH-AIDS Reagent Program	NIH-AR
<a href="#">return value</a>	012172	NIH-Center for Information Technology	NIH-CIT
<a href="#">return value</a>	010125	NIH-Center for Scientific Review	NIH-RG
<a href="#">return value</a>	012107	NIH-Fogarty International Center	NIH-TW
<a href="#">return value</a>	011283	NIH-National Cancer Institute	NIH-CA
<a href="#">return value</a>	012475	NIH-National Center for Advancing Translational Sciences	NIH-NCATS



Click on return value to return that selection to the original Lookup screen.

Sponsor ID:   

## Open Book Icon

When you type or select a value in a field that has the  , you can click on it to find out the details about that value through a pop-up.

Sponsor ID:    

# Sponsor

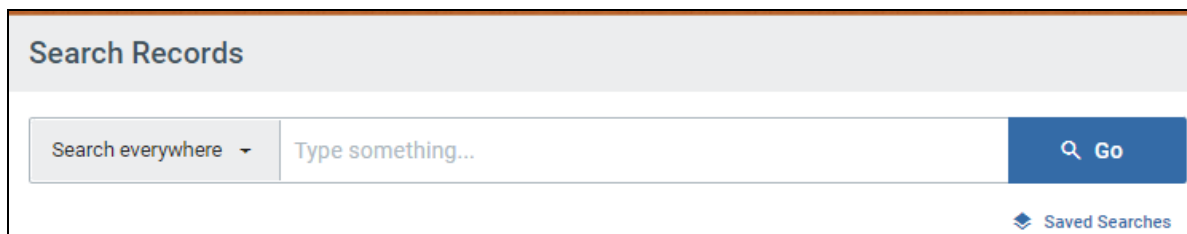
Sponsor

▼ hide

<b>Sponsor Code:</b>	000500
<b>Acronym:</b>	NSF
<b>Audit Report Sent For Fy:</b>	
<b>CAGE Number:</b>	4400
<b>Country Code:</b>	United States
<b>DODAC Number:</b>	
<b>DUN And Bradstreet Number:</b>	074811803
<b>DUNS Plus Four Number:</b>	
<b>Owned By Unit:</b>	<a href="#">University of Maryland</a>
<b>Postal Code:</b>	22230
<b>Address Book Id:</b>	11745
<b>Sponsor Name:</b>	NSF
<b>Sponsor Type:</b>	<a href="#">Federal</a>
<b>State:</b>	VIRGINIA

# 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 the 'Search Records' header. Below it is a search bar with a dropdown menu labeled 'Search everywhere', a text input field containing 'Type something...', a blue 'Go' button with a magnifying glass icon, and a link for 'Saved Searches' with a bookmark icon.

**NOTE:** The traditional full search tools are 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., account : GR010345 and acct GR02398).
- Keep in mind, when performing a search, it may return results that contain only a portion of that value (e.g., searching 301234 and will match with GR301234).

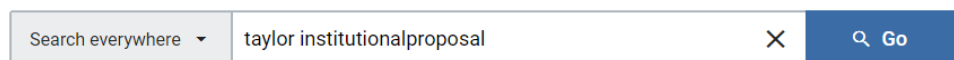
## Below are some examples of simple searches:

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



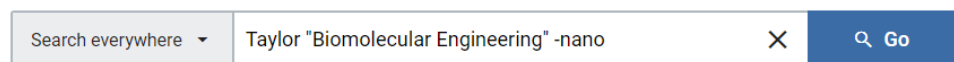
A search bar with a dropdown menu labeled 'Search everywhere', a text input field containing 'Taylor', a clear button (X), and a blue 'Go' button with a magnifying glass icon.

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', a text input field containing 'taylor institutionalproposal', a clear button (X), and a blue 'Go' button with a magnifying glass icon.

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', a text input field containing 'Taylor "Biomolecular Engineering" -nano', a clear button (X), and a blue 'Go' button with a magnifying glass icon.

Search for award numbers using quotes (otherwise, the search will misinterpret the “-”).



A search bar with a dropdown menu labeled 'Search everywhere', a text input field containing '"300734-00002"', a clear button (X), and a blue 'Go' button with a magnifying glass icon.

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', a text input field containing '300734', a clear button (X), and a blue 'Go' button with a magnifying glass icon.

Searching by Workday GR ID will return awards and subawards funded by that account number.

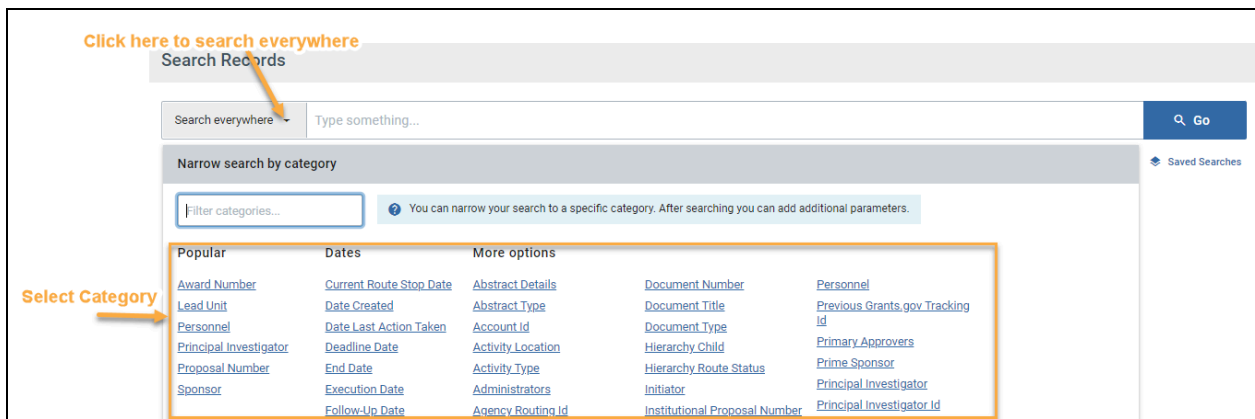
## Search Records

Search everywhere ▾ GR03391 X Go

 Saved Searches


### 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 columns you’d like to search within using specific values instead of searching across all columns. If you get lots of unwanted results, using the category limits here is highly recommended.



Click here to 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="#">Current Route Stop Date</a>	<a href="#">Abstract Details</a>
<a href="#">Lead Unit</a>	<a href="#">Date Created</a>	<a href="#">Abstract Type</a>
<a href="#">Personnel</a>	<a href="#">Date Last Action Taken</a>	<a href="#">Account Id</a>
<a href="#">Principal Investigator</a>	<a href="#">Deadline Date</a>	<a href="#">Activity Location</a>
<a href="#">Proposal Number</a>	<a href="#">End Date</a>	<a href="#">Activity Type</a>
<a href="#">Sponsor</a>	<a href="#">Execution Date</a>	<a href="#">Administrators</a>
	<a href="#">Follow-Up Date</a>	<a href="#">Agency Routing Id</a>
		<a href="#">Document Number</a>
		<a href="#">Document Title</a>
		<a href="#">Document Type</a>
		<a href="#">Hierarchy Child</a>
		<a href="#">Hierarchy Route Status</a>
		<a href="#">Initiator</a>
		<a href="#">Institutional Proposal Number</a>
		<a href="#">Personnel</a>
		<a href="#">Previous Grants.gov Tracking Id</a>
		<a href="#">Primary Approvers</a>
		<a href="#">Prime Sponsor</a>
		<a href="#">Principal Investigator</a>
		<a href="#">Principal Investigator Id</a>

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

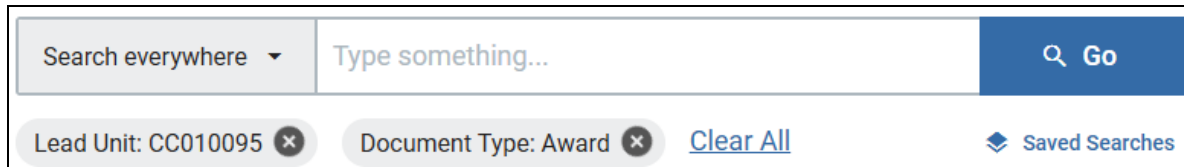
X Search Lead Unit CC010095 X Go

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

Search everywhere ▾ Type something... Go

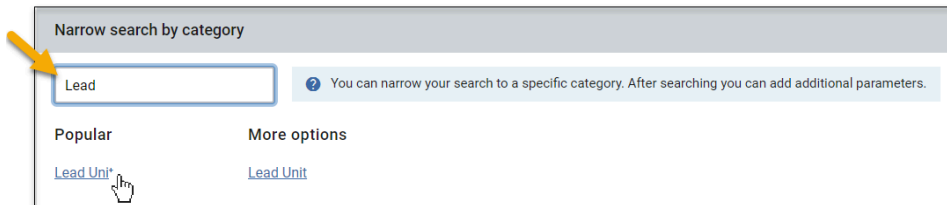
Lead Unit: CC010095 X Clear All  Saved Searches

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



A search interface showing a search bar with the text "Type something...", a "Go" button, and two active filters: "Lead Unit: CC010095" and "Document Type: Award". There is also a "Clear All" link and a "Saved Searches" link.

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



A dialog box titled "Narrow search by category". It has a search input field containing "Lead". Below the input field are two sections: "Popular" with a link "Lead Unit\*" and "More options" with a link "Lead Unit". A yellow arrow points to the "Lead Unit\*" link.


### Show/Hide Columns

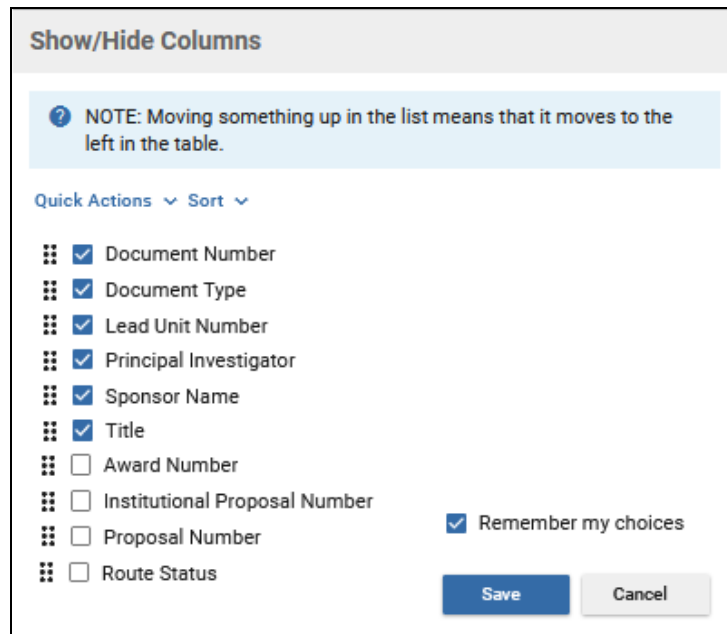
After you've performed a search, you will see a “Show/Hide Columns” button available, which allows you to select which columns you want to be visible in your search results. The button is located on the search results screen's far right and appears only after your initial search results are displayed.



### 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.

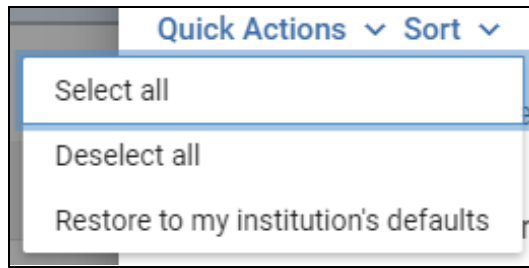
You may manually reorder your results by clicking on the six dots  by a column and dragging and dropping to the desired location.



A dialog box titled "Show/Hide Columns". It contains a note: "NOTE: Moving something up in the list means that it moves to the left in the table." Below the note are two dropdown menus: "Quick Actions" and "Sort". A list of columns follows, each with a six-dot reorder icon and a checkbox: Document Number (checked), Document Type (checked), Lead Unit Number (checked), Principal Investigator (checked), Sponsor Name (checked), Title (checked), Award Number (unchecked), Institutional Proposal Number (unchecked), Proposal Number (unchecked), and Route Status (unchecked). At the bottom right, there is a "Remember my choices" checkbox (checked) and "Save" and "Cancel" buttons.

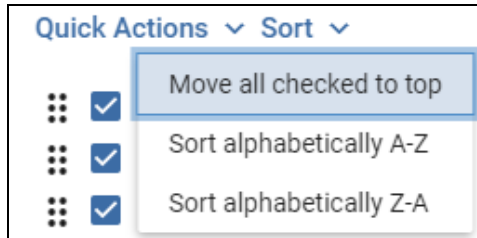
### Quick Actions

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 updates 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 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	Award Number	Route Status
<a href="#">Award</a>	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033230	312266-00001	FINAL
<a href="#">Award</a>	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033231	312266-00001	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 Document Numbers you see listed here. 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	Award Number	Route Status
<a href="#">Award</a>	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033230	312266-00001	FINAL
<a href="#">Award</a>	Egloff, Sally Louise	NIH-National Institute of Mental Health	6033231	312266-00001	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 canceled proposal.
- 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.

## 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 Columns to display in your search results with the “Show/Hide Columns” tool can help successfully navigate your returned results. We have listed some suggestions below based on the document type. You can mix and match or use any 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

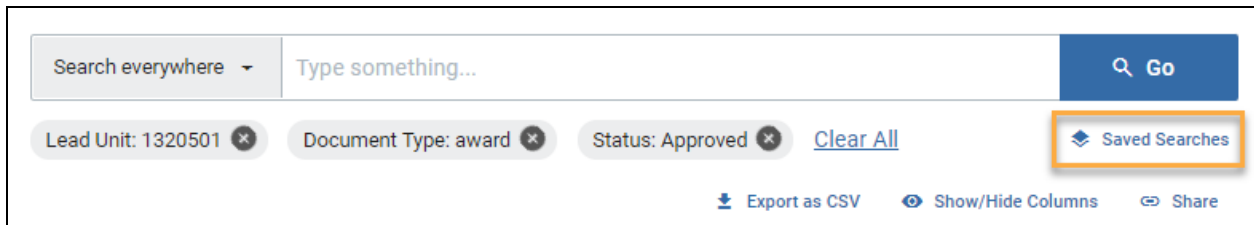
☑	Document Type
☑	Proposal Number
☑	Lead Unit Number
☑	Principal Investigator
☑	Sponsor Name
☑	Title
☑	Start Date
☑	End Date
☑	Status
☑	Deadline Date
☑	Document Number

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

## Saved Searches

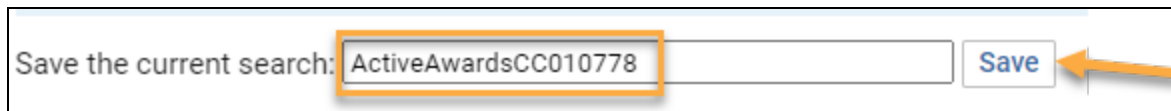
You can save/retrieve searches via the Saved Search button.

To save a search, put together your search criteria, then click on Saved Searches.



A screenshot of a search interface. At the top, there is a search bar with a dropdown menu labeled "Search everywhere" and a text input field containing "Type something...". To the right of the search bar is a blue button with a magnifying glass icon and the text "Go". Below the search bar, there are three filter tags: "Lead Unit: 1320501", "Document Type: award", and "Status: Approved", each with a close button (an 'x' in a circle). To the right of these filters is a link labeled "Clear All". Further right is a button labeled "Saved Searches" with a folder icon. At the bottom of the interface, there are three more options: "Export as CSV", "Show/Hide Columns", and "Share".

Type in a name for the search and click on Save

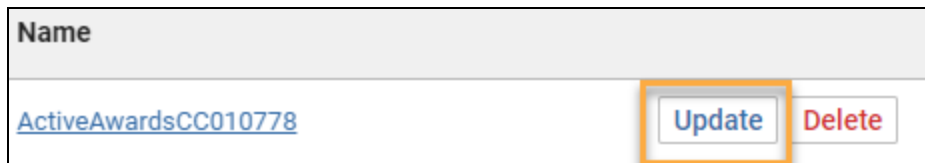


A screenshot of a dialog box titled "Save the current search:". It contains a text input field with the text "ActiveAwardsCC010778" and a "Save" button to its right. An orange arrow points to the "Save" button.

When you have one or more searches saved and you click on Saved Searches, you will see your searches. To run the search, click on the search name. To remove the saved search, click on Delete.

## Update a Saved Search

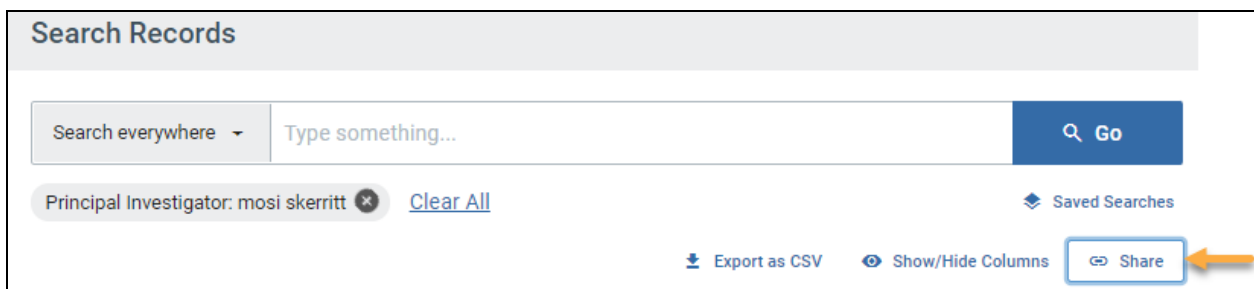
To update a Saved Search, you must first run the saved search. Note that the Update button is initially greyed out. With the saved search results, make your changes to the search. Click on Saved Searches and click on the Update button.



A screenshot of a table with one row. The table has a header row with the text "Name". The row below contains the text "ActiveAwardsCC010778" and two buttons: "Update" and "Delete". The "Update" button is highlighted with an orange box.

## Share a Search

To share a search, click on the Share button.



A screenshot of a search interface titled "Search Records". It features a search bar with a dropdown menu labeled "Search everywhere" and a text input field containing "Type something...". To the right of the search bar is a blue button with a magnifying glass icon and the text "Go". Below the search bar, there is a filter tag: "Principal Investigator: mosi skerritt" with a close button (an 'x' in a circle). To the right of this filter is a link labeled "Clear All". Further right is a button labeled "Saved Searches" with a folder icon. At the bottom of the interface, there are three more options: "Export as CSV", "Show/Hide Columns", and "Share". An orange arrow points to the "Share" button.

Click on Copy URL. You can then send this URL to the others who can run it and if desired, save it to their Saved Searches. As always, any search results are limited to the user's permissions.