



Navigation in Kuali Research

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Last updated: 11/01/18

Table of Contents

Topic	Page
<u>Navigation in Quali Research</u>	3
<u>Lookup Screen Search Techniques</u>	9

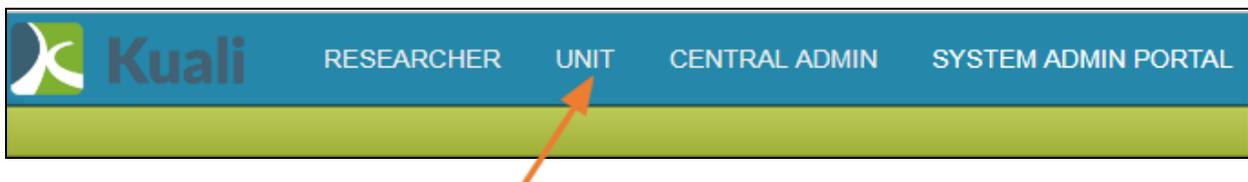
Navigation in Kuali Research

Once you have logged in to Kuali Research, you will see the Kuali Welcome screen. You can have multiple instances of Kuali Research open at the same time.



To navigate from the welcome screen, you can click on a Role located across the top, type in text in the Search Tasks field, or click on an item under the Quick Links.

Roles



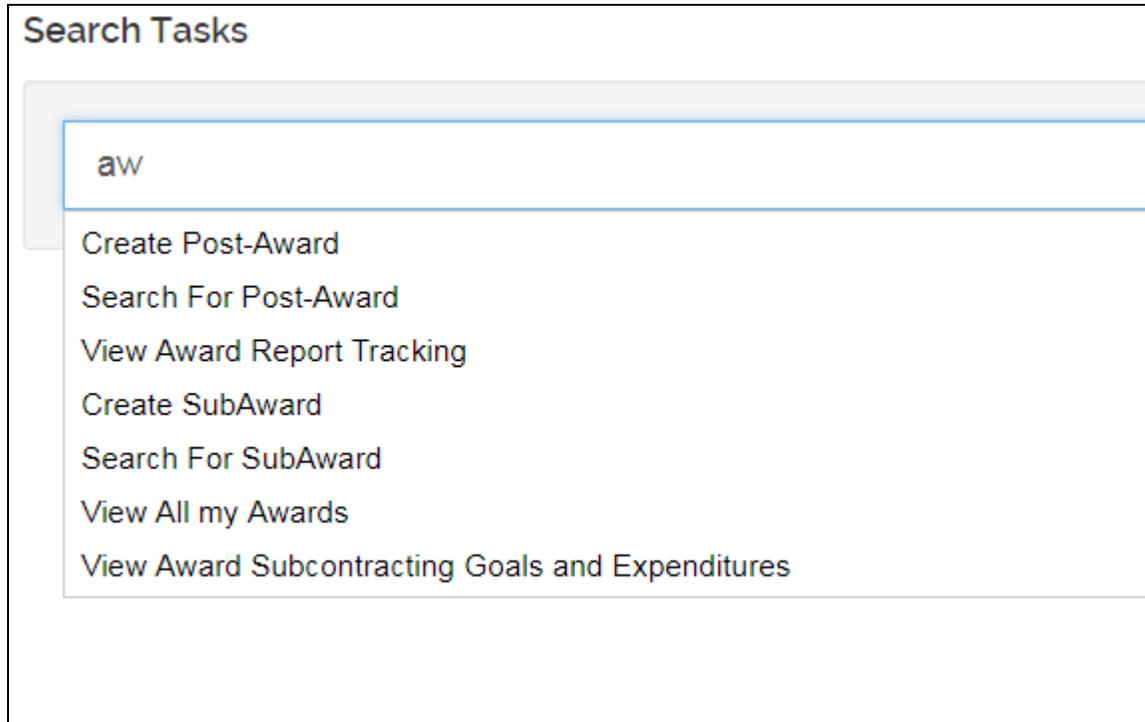
When you click on a Role, Kuali will show you a menu of actions for that role.

UNIT	CENTRAL ADMIN	SYSTEM ADMIN PORTAL
Pre-Award		Post-Award
<ul style="list-style-type: none"> ➤ Proposal Development + 🔍 ➤ Proposal Log + 🔍 ➤ Institutional Proposal + 🔍 ➤ Negotiations + 🔍 ➤ All My Negotiations 		<ul style="list-style-type: none"> ➤ Award + 🔍 ➤ Award Report Tracking ➤ Subaward + 🔍

Click on the + to add a new item or the 🔍 to lookup an item.

Search Tasks

When you type in the Search Tasks field, Kuali will list the modules that fit your text. When you click on the text, Kuali will go directly to that module



The screenshot shows a search interface with a header "Search Tasks". Below it is a search input field containing the text "aw". A dropdown menu is open, displaying a list of search results:

- Create Post-Award
- Search For Post-Award
- View Award Report Tracking
- Create SubAward
- Search For SubAward
- View All my Awards
- View Award Subcontracting Goals and Expenditures

Quick Links

When you click on a Quick Link, Kuali will take you directly to that module.

Quick Links

- [Search for a Sponsor](#)
- [View Address Book](#)
- [Search for an Organization](#)
- [View S2S Opportunities](#)
- [View Pessimistic Lock \(Locked Records\)](#)

Module Lookup Screen

Each module lookup screen contains various criteria to search on. See [Lookup Screen Search Techniques](#) for specifics on how to do a 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 Welcome screen

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.

Actions	Requisitioner
open medusa	Jason Michael Strahan



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

Module Detail Screen

Tabs



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

Expand All/Collapse All



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

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

Collapse all – collapses screen back to just the panels 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 Quali 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 Quali Welcome screen, use the back arrow to return to the previous screen.

Detail Double Click

On any field that is blue, 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 detail information for this item is available. Click on  to view the detail. 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 permissions to view the information in the link.

Lookup Screen Search Techniques

Basic Searching

Across all the modules in Quali Research 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.

Operator	Name	Example	Comment
*	Wildcard Any Char	Title: *apple*	Search for “apple” anywhere in the title, regardless of 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*	Search for a word that has any one character that precedes “ffect” (e.g. “affect” or “effect”) in the beginning of a title
(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: 1330101..1330103	Search records with Lead Unit from “1330101” to “1330103” (Just like combining Greater Than or Equal to and Less Than or Equal to)
>	GREATER THAN	Lead Unit: >1330101	Search records with Lead Unit Greater than “1330101”
>=	GREATER THAN OR EQUAL TO	Lead Unit: >=1330101	Search records with Lead Unit Greater than or Equal to “1330101”
<	LESS THAN	Lead Unit: <1330101	Search records with Lead Unit Less than “1330101”
>=	LESS THAN OR EQUAL TO	Lead Unit: <=1330101	Search records with Lead Unit Less than or Equal to “1330101”
	SERIES	Lead Unit: >=1330101&&<=1330103	Just Like SERIES (..) above. Search records with Lead Unit from “1330101” to “1330103”

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
return value	012173	NIH-AIDS Reagent Program	NIH-AR
return value	012172	NIH-Center for Information Technology	NIH-CIT
return value	010125	NIH-Center for Scientific Review	NIH-RG
return value	012107	NIH-Fogarty International Center	NIH-TW
return value	011283	NIH-National Cancer Institute	NIH-CA
return value	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 detail about that value through a pop-up.

Sponsor ID:   

Sponsor	
Sponsor	▼ hide
Sponsor Code:	000500
Acronym:	NSF
Audit Report Sent For Fy:	
CAGE Number:	4400
Country Code:	United States
DODAC Number:	
DUN And Bradstreet Number:	074811803
DUNS Plus Four Number:	
Owned By Unit:	University of Maryland
Postal Code:	22230
Address Book Id:	11745
Sponsor Name:	NSF
Sponsor Type:	Federal
State:	VIRGINIA