

# Dashboard Navigation in KualI Research

1. Follow steps above in **Logging in to KualI Research** .
2. KualI Dashboard is comprised of the following

Dashboard “Home”  
 Search Records  
 Common Tasks  
 All Links  
 Reports

## Dashboard Home

**Proposals routing to me**

- 1 step away Proposal #1474 – PI: Hehmsoth, Henry – Sponsor: Council on Library and Information Resources – Title: Preserving L...  
Due date: 7/15/20 Last action: Rust, Raquel Garcia; 8/26/20 8:19 AM
- 1 step away Proposal #1546 – PI: Cade, Tina – Sponsor: Tarleton University – Title: The Impact of companion h... – Lead unit: 500...  
Due date: 7/01/20 Last action: Chahin, T. Jaime; 9/17/20 9:23 AM
- 1 step away Proposal #1663 – PI: Carlos-Shanley, Camila – Sponsor: U.S. Forestry Service – Title: Role of gut microbiota in... – Le...  
Due date: 8/31/20 Last action: Rust, Raquel Garcia; 8/26/20 8:23 AM
- 1 step away Proposal #2184 – PI: Lew, Kristen – Sponsor: National Science Foundation – Title: CAREER: Understanding Und... – L...  
Due date: 7/27/20 Last action: Rust, Raquel Garcia; 8/26/20 8:26 AM
- 1 step away Proposal #2206 – PI: Anderson, Ryan – Sponsor: Eastern New Mexico University – Title: Enhancing STEM skills the...  
Due date: 10/28/20 Last action: Anderson, Ryan Gerald; 9/03/20 10:07 AM

**Proposals not routing**

- Proposal #2248 – PI: Ahlman, Todd – Sponsor: U.S. Army Corp of Engineers – Title: Cultural Resources Techni... – Le...  
Due date: 6/26/20 Last action: Rust, Raquel Garcia; 6/12/20 8:23 AM
- Proposal #2247 – PI: Alfaro, Edna – Sponsor: National Science Foundation – Title: Variations in Sibling Dya... – Lead ...  
Due date: 7/15/20 Last action: Alfaro, Edna C; 6/11/20 5:05 PM
- Proposal #2211 – PI: Anderson, Ryan – Sponsor: U.S. Dept of Agriculture – Title: Establishing an Agricultu... – Lead u...  
Due date: 7/16/20 Last action: Anderson, Ryan Gerald; 5/27/20 3:58 PM
- Proposal #2207 – PI: Anderson, Ryan – Sponsor: Tarleton University – Title: SWEET: Standardizing Weld... – Lead unit...  
Due date: 10/28/20 Last action: Anderson, Ryan Gerald; 5/27/20 2:29 PM
- Proposal #2208 – PI: Anderson, Ryan – Sponsor: U.S. Dept of Agriculture – Title: Utilizing virtual reality... – Lead unit: ...  
Due date: 10/28/20 Last action: Anderson, Ryan Gerald; 5/27/20 2:47 PM

**Proposal workload assignments**

Proposal Number	Principal Investigator	Sponsor	Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#1663	Carlos-Shanley, Camila	U.S. Forestry Service	50000116	Role of gut microbiota in thermal tolerance of subterranean termites	08/31/2020	08/26/2020 8:23 AM	Hahn, Dittmar; Carlos-Shanley, Camila	<a href="#">Choose person</a>
#2238	Grasso, Kenneth	Jack Miller Center	50000109	Discourse in Democracy	06/30/2020	06/26/2020 9:24 AM	Grasso, Kenneth L	<a href="#">Choose person</a>
#1474	Hehmsoth, Henry	Council on Library and Information Resources	50000132	Preserving the Interview Recordings of Phil Schaap, Renowned Broadcaster, Jazz Research Scholar, and Jazz Curator for Lincoln Center, NYC	07/15/2020	08/26/2020 8:19 AM	Fleming, John; Martin, Joey; Hehmsoth, Henry	<a href="#">Choose person</a>
#2283	Mettler, Joni	Texas State University Research Foundation	50000094	Screening and Prevention of Sarcopenia with Promotion of Healthy Lifestyle in Middle-aged and Older Adults	06/26/2020	06/26/2020 7:48 AM	Proposal Department Unit Heads	<a href="#">Choose person</a>
#2291	Davis, Rebecca	Alamo Area Council Of Governments	50000105	ILA-20-130-RR-Texas State University, Task Order #1, Documenting Illegal Dumping in Atascosa, Frio, and Medina Counties	06/29/2020	06/29/2020 2:55 PM	Lu, Yongmei	<a href="#">Choose person</a>
#2206	Anderson, Ryan	Eastern New Mexico University	50000083	Enhancing STEM skills through Metal Fabrication	10/28/2020	09/03/2020 10:07 AM	Anderson, Ryan Gerald; Dey, Medan; Moher, Chahin, T. Jaime	<a href="#">Choose person</a>
#1546	Cade, Tina	Tarleton University	50000083	The impact of companion hemp plantings on pollinator populations	07/01/2020	09/17/2020 9:23 AM	Cade, Tina Marie	<a href="#">Choose person</a>
#2184	Lew, Kristen	National Science Foundation	50000118	CAREER: Understanding Undergraduate Mathematical Maturity: Its Attribution, Measurement, and Instrumentation (UMAMI)	07/27/2020	08/26/2020 8:26 AM	Lew, Kristen Marie; Morey, Susan	<a href="#">Choose person</a>

- I. Left Bar Navigation
- II. Proposals Routing to Me card
- III. Proposals Not Routing card
- IV. Proposal Workload Assignments

### Left Bar Navigation

- **Dashboard Home** - New main page for the KualI Research system that allows you to track document progress and manage proposal routing.
- **Search** – This search bar allows you to search by proposal name, PI, sponsor, etc.
- **Common Tasks** - A place where you can easily access your most common tasks whether that's searching, creating new records, or other actions. Also available is the search option at the top to give easy access to any system action.
- **All Links** - To access all available links in the system or search available options at the top.

- Reports - If user has the Global Reports role they will have the Reports link to take them to the reporting tool.
- Help – System help, generates email to ORSP.
- About - Will display the current version information for Kual Research.
- Logout - Gives the user the option to log out of the Kual Research system.
- Profile - Allows you to see which user is logged into the system and more information on the user profile in Core.
- Switch Apps - Gives you the option to switch to different applications within the system (Research, COI, Protocols).

### Proposals Routing to Me

Proposals routing to me	
1 step away	Proposal #1474 – P Due date: 7/15/20
1 step away	Proposal #1546 – P Due date: 7/01/20
1 step away	Proposal #1663 – P Due date: 8/31/20
1 step away	Proposal #2184 – P Due date: 7/27/20
1 step away	Proposal #2206 – P Due date: 10/28/20

This card will show users what proposals are pending their approval and the steps away from which that user will need to approve. As Texas State has a flat route (approval is requested from PI, Chair and Dean simultaneously), almost all cards will either have a “1 step away” or “You’re Up” status.

### Proposals Not Routing

Proposals not routing	
Proposal	Proposal #2248 – PI: Ahlma Due date: 6/26/20 Last ac
Proposal	Proposal #2247 – PI: Alfaro, Due date: 7/15/20 Last ac
Proposal	Proposal #2211 – PI: Ander: Due date: 7/16/20 Last ac
Proposal	Proposal #2207 – PI: Ander: Due date: 10/28/20 Last a
Proposal	Proposal #2208 – PI: Ander: Due date: 10/28/20 Last a

This card will show users what proposals are in progress within Proposal Development. For PIs this will include all proposals a user is list as Senior/Key Personnel. For Chairs and Deans this list will include work in which they are PIs themselves as well as the activity of all faculty within their Department or College.

## Proposal Workload Assignments

Proposal Number	Principal Investigator	Sponsor	Unit	Title	Due Date	Last Action	Current Request(s)	Assigned Approver
#1474	Hehmoth, Henry	Council on Library and Information Resources	50000132	Preserving the Interview Recordings of Phil Schaap, Renowned Broadcaster, Jazz Research Scholar, and Jazz Curator for Lincoln Center, NYC	07/15/2020	08/26/2020 8:19 AM	Fleming, John; Martin, Joey; Hehmoth, Henry	<a href="#">Choose person</a>
#2258	Grasso, Kenneth	Jack Miller Center	50000109	Discourse in Democracy	06/30/2020	06/26/2020 9:24 AM	Grasso, Kenneth L	<a href="#">Choose person</a>
#1663	Carlo-Shanley, Camila	U.S. Forestry Service	50000116	Role of gut microbiota in thermal tolerance of subterranean termites	08/31/2020	08/26/2020 8:23 AM	Hahn, Dittmar; Carlo-Shanley, Camila	<a href="#">Choose person</a>
#2283	Mettler, Joni	Texas State University Research Foundation	50000094	Screening and Prevention of Sarcopenia with Promotion of Healthy Lifestyle in Middle-aged and Older Adults	06/26/2020	09/26/2020 7:48 AM	Proposal Department Unit Heads	<a href="#">Choose person</a>

This card will show users (like the Routing to Me card) proposals in which they are PI and are still routing. This card will show the user what other individuals must still approve the proposal. For Chairs and Deans, this card will show all activity within their Department or College as well as the routing status for each and who is left to approve.

## Search Records

This search bar allows you to search by proposal name, PI, sponsor, etc.

Search everywhere ▾
1967
✕
🔍 Go

[Show/Hide Columns](#)

Proposal Number	Lead Unit Number	Principal Investigator	Sponsor Name	Deadline Date	Status
1967	50000073	Herdy, Thomas	City of San Marcos	2020-02-28T00:00:00.000+0000	Approved and Submitted

## Common Tasks

A place where you can easily access your most common tasks whether that's searching, creating new records, or other actions. Also available is the search option at the top to give easy access to any system action.

### Common Tasks

#### Quick Links

- [Action List](#)
- [Doc Search](#)
- [Current & Pending Support](#)
- [Person Training](#)
- [View S2S Submissions](#)
- [Locks](#)

#### Award

- [All My Awards](#)
- [Create Award](#)
- [Search Awards](#)

#### COI

- [My Disclosures](#)

#### Institutional Proposal

- [Create Institutional Proposal](#)
- [Create Proposal Log](#)
- [Search Institutional Proposals](#)
- [Search Proposal Logs](#)

#### Proposal Development

- [All My Proposals](#)
- [Create Proposal](#)
- [Search Proposals](#)

#### Protocols

- [Manage Protocols](#)

### Quick Links

- Action List: Allows a user to see any proposals in routing, awaiting approval.
- Doc Search: Admin use only.
- Current & Pending Support: Not in Use at Texas State.
- Person Training: Not in Use at Texas State.
- View S2S Submissions: Not in Use at Texas State.

- Locks: Admin use only.

*Award*

- Award for Admin use only

*COI*

- My Disclosures: SFI submission portal

*Institutional Proposal*

- Institutional for Admin use only

*Proposal Development*

- All My Proposals: These are proposals in which the user is a named PI.
- Create Proposal: This link will take a user to the main create proposal portion of Kuali.
- Search Proposals: This link will lead a user to the main search bars for proposals. Here a user can search by PI, Title, Sponsor, Due Date, etc.

*Protocols*

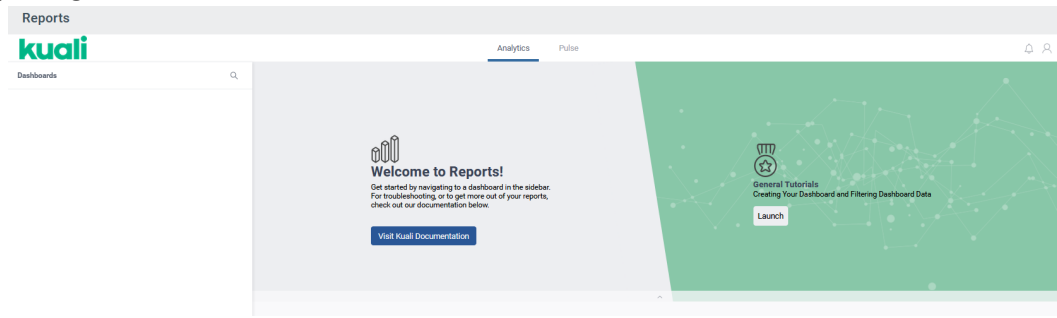
- Manage Protocols: IRB and IACUC Module link

**All Links**

To access all available links in the system or search available options at the top. This an administrator use only section.

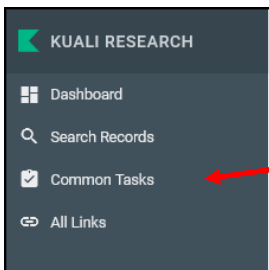
**Reports**

If user has the Global Reports role they will have the Reports link to take them to the reporting tool.

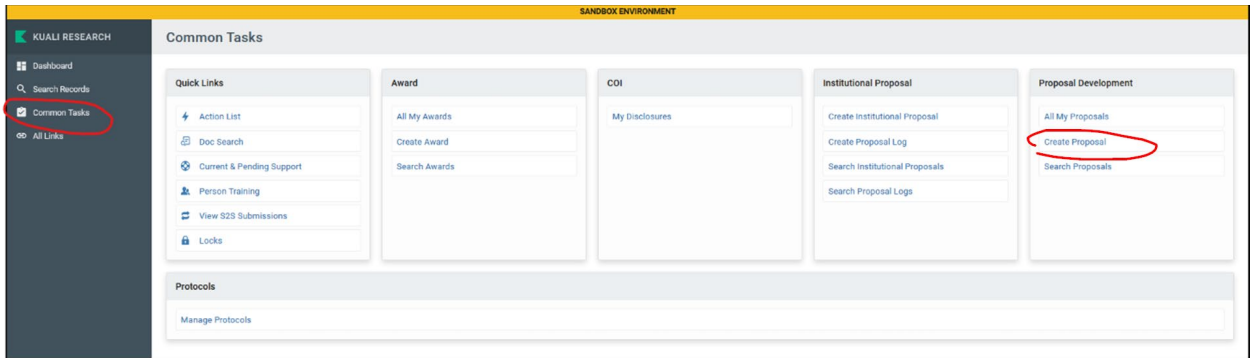


**Creating a Proposal in Kuali**

1. Follow steps above in **Logging in to Kuali Research** to login into your dashboard.
2. Navigate to Common Tasks



3. Navigate to Proposal Development Card, select Create Proposal



4. Initiate and Create Proposal in Kuali ([See Quick-Training Guide](#))