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

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 Kuali Research.
- Logout - Gives the user the option to log out of the Kuali 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

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

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	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	Choose person
#2258	Grasso, Kenneth	Jack Miller Center	50000109	Discourse in Democracy	06/30/2020	08/26/2020 9:24 AM	Grasso, Kenneth L	Choose person
#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	Choose person
#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	Choose person

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.

Proposal Number	Lead Unit Number	Principal Investigator	Sponsor Name	Deadline Date	Status
1967	50000073	Hardy, 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	Award	COI	Institutional Proposal	Proposal Development
⚡ Action List	All My Awards	My Disclosures	Create Institutional Proposal	All My Proposals
🗐 Doc Search	Create Award		Create Proposal Log	Create Proposal
⊗ Current & Pending Support	Search Awards		Search Institutional Proposals	Search Proposals
👥 Person Training			Search Proposal Logs	
⇄ View S2S Submissions				
🔒 Locks				

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.
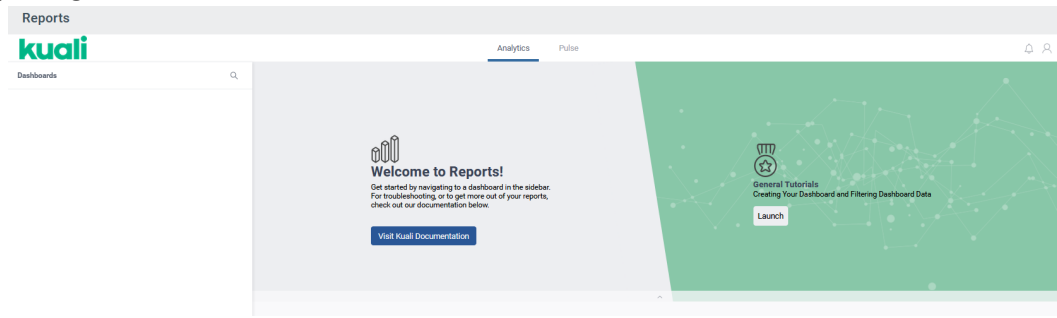
Protocols
- Manage Protocols: IRB and IACUC Module link

All Links

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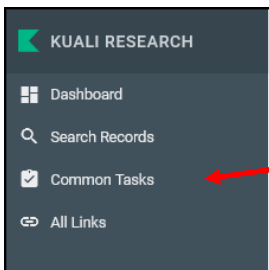
Reports

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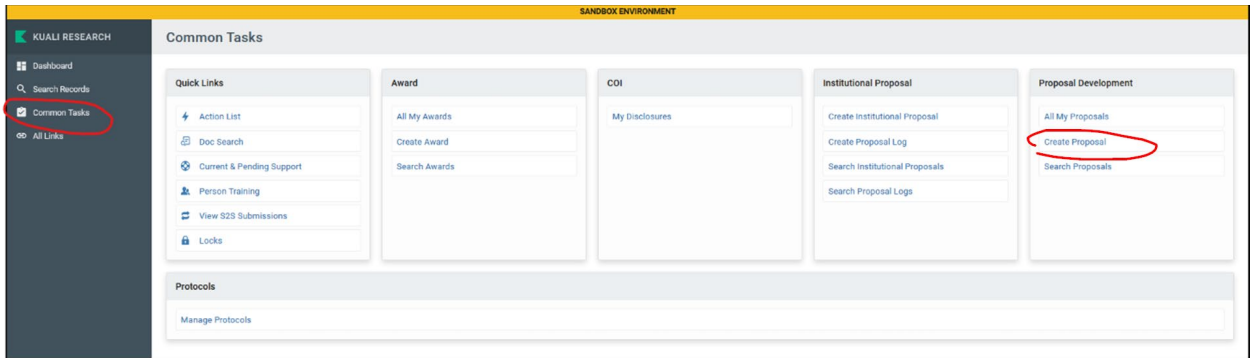

Creating a Proposal in Kuali

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)