

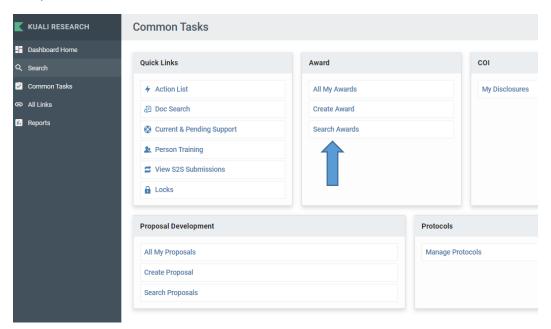
## **QUICK GUIDE**

## How to search for the existing Award ID (including legacy awards)

(Continuations, Supplements, Renewals, and some P&As and Internals)

LOG IN: Go to <a href="https://umass.kuali.co/dashboard">https://umass.kuali.co/dashboard</a> and log in using your NetID and Password. Then select Common Tasks on the left pane.

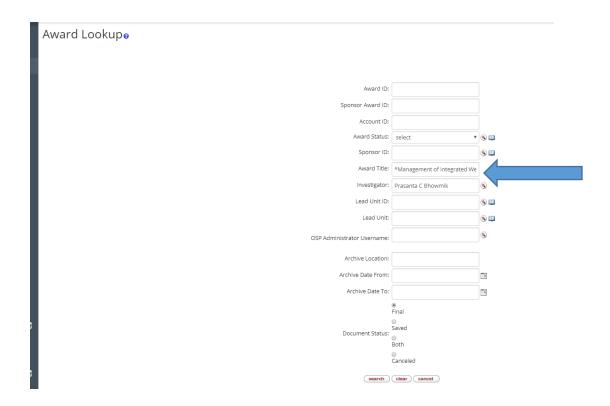
Next, select Search Awards.



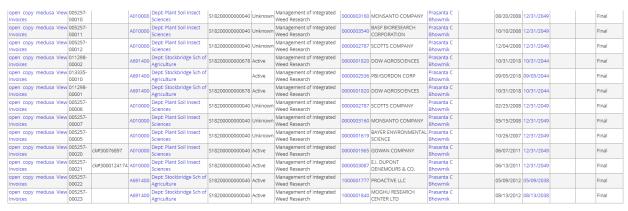
On the **Award Lookup** page, enter as many search fields as needed to hone in on the targeted award (e.g. PI, Award Title, Sponsor, etc). Experiment with this. If a search field has a magnifying glass icon, select it and then search and "return value".

- Use \*asterisks\* in front and back of the search terms see Award Title field below.
- If searching by title, sometimes including fewer words from the title are better try searching using a distinct two or three words only. Sometimes a title will change from one award action to another by just one word.





After searching, run a report by selecting spreadsheet (seen below this chart on the left).



Export options: CSV | spreadsheet | XML

**Suggestions:** Save as an Excel Workbook when multiple award records appear in order to hone in on the correct version. Delete columns as needed and add a filter to help with the sort and search process.

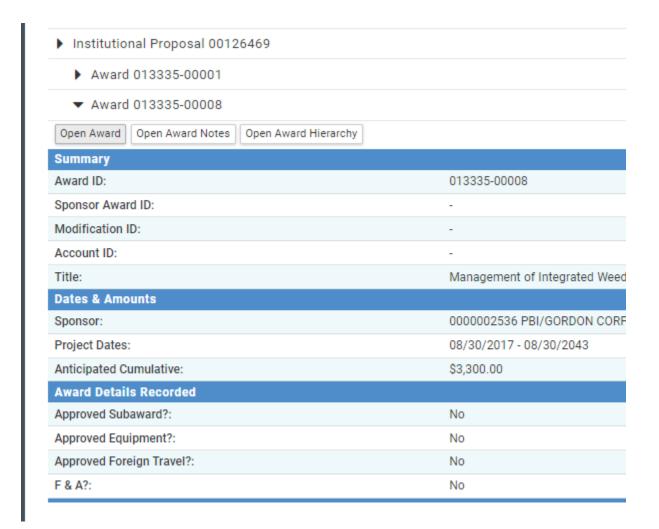


## Identify the correct award

Always select the so-called "Parent" award – the suffix is always "-00001"

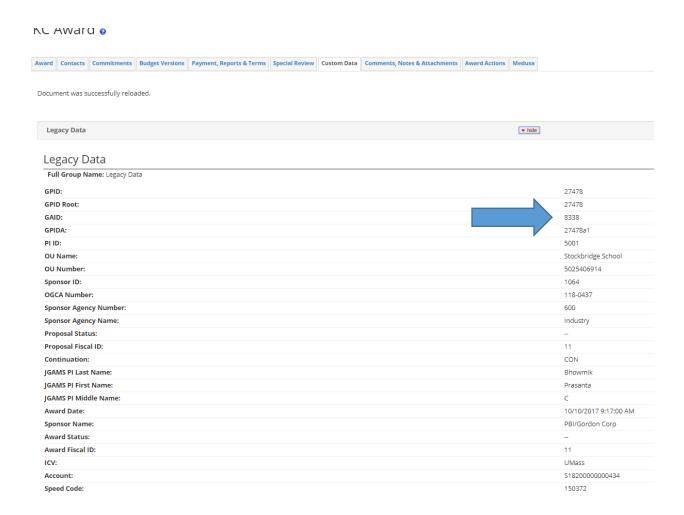
## Note: To confirm linkage with the correct legacy award record:

- In Kuali, select **Medusa** in the "-00001" record.
- In the list that appears, select any award record except for the "-00001" Parent (the legacy data does not reside in the "Parent" record).
- Select Open Award.





- Next, select the Custom Data tab.
- Then select by **Legacy Data** click the hide button to review legacy (SmartGrant) data and confirm correct linkage





Once the correct Kuali Award ID has been identified, add the Award ID "Parent" in the **Award ID** field (see below) for proposals under development. This applies to the following proposal types: "Continuations" and "Supplements" and when applicable "Renewals." It also applies to some "P&A (Unrestricted Award)" and "Internal (No Submission)" if the award action should be added to an existing account.

