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 https://umass.kuali.co/dashboard 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).

**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**.

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**Institutional Proposal 00126469**

<table>
<thead>
<tr>
<th>Award</th>
<th>013335-00001</th>
<th>013335-00008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Award</td>
<td>Open Award Notes</td>
<td>Open Award Hierarchy</td>
</tr>
</tbody>
</table>

**Summary**

- **Award ID:** 013335-00008
- **Sponsor Award ID:** -
- **Modification ID:** -
- **Account ID:** -
- **Title:** Management of Integrated Weed

**Dates & Amounts**

- **Sponsor:** 0000002536 PBI/GORDON CORP
- **Project Dates:** 08/30/2017 - 08/30/2043
- **Anticipated Cumulative:** $3,300.00

**Award Details Recorded**

- **Approved Subaward?:** No
- **Approved Equipment?:** No
- **Approved Foreign Travel?:** No
- **F & A?:** No
• Next, select the **Custom Data** tab.
• Then select **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.