QUICK GUIDE
Logging in and Navigating the Kuali Dashboard

Overview: The Kuali Research Dashboard offers quick access to common tasks as well as links to all the Kuali Modules. A detailed overview can be found on the Kuali ZenDesk:
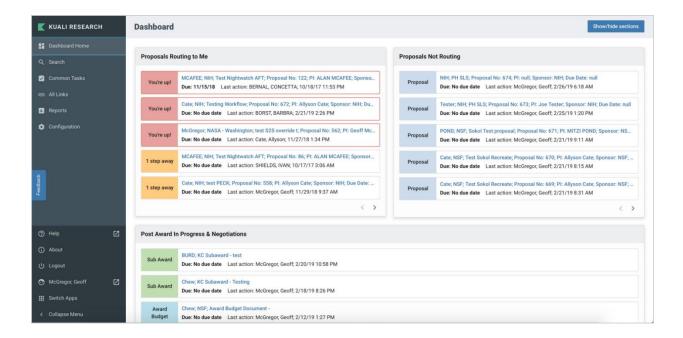**https://kuali-research.zendesk.com/hc/en-us/articles/360011575473-Dashboard-Overview**

Log In: Go to the UMass Kuali website (https://umass.kuali.co/dashboard) and log in with your NetID and Password.

Dashboard Main Page:
The Kuali Research Dashboard is the main page that users will see when logged into the Kuali Research system. The dashboard homepage gives users tools to manage in-progress documents like proposal routing and approvals.

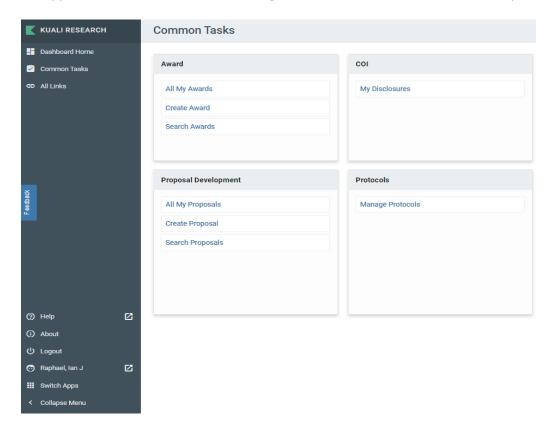**A detailed walkthrough of the dashboard can be found here:**
https://kuali-research.zendesk.com/hc/en-us/articles/360018819434-Dashboard-Walkthrough

Common Tasks

The Common Tasks tab in the Kuali Research Dashboard allows easy access to commonly used links in the application. It is also where users will go to access the IRB, IACUC and COI compliance modules.

Proposal Workload

The Proposal Workload tab in the Kuali Research Dashboard shows all routing proposals at a specific approval stop and serves as a workload management tool. It allows a PI to see how busy the research administration office is.

Proposal Workload Assignments

Proposal Number	Principal Investigator	Sponsor	Unit	Title	Due Date	Last Action	Primary Approver	Assigned Approver
#531	Chew, Inez	NSF	000001	Sokol test for IP budget linking issue	11/15/2018 12:00 AM	11/06/2018 12:00 AM	Testing Group	BORST, BARBRA ✕
#526	Chew, Inez	NIH	BL-IIDC	Func Review RESKC-3282		10/24/2018 11:00 PM	Testing Group	Chew, Inez ✕
#524	Chew, Inez	NIH	BL-IIDC	Testing Attachment Functionality		10/24/2018 11:00 PM	Testing Group	Chew, Inez ✕
#464	Cate, Allyson	NIH	BL-IIDC	Testing Proposal Creation		09/17/2018 11:00 PM	OSPApprover	Cate, Allyson ✕
#519	Chew, Inez	NIH	IN-CARD	Testing routing		10/22/2018 11:00 PM	Testing Group	Cate, Allyson ✕
#508	BURD, ALTHEA	Air Force Systems - SAMSO	IN-CARD	research project	10/30/2018 11:00 PM	10/11/2018 11:00 PM	Testing Group	Choose Person
#463	Cate, Allyson	NIH	BL-IIDC	Testing Proposal Creation		09/17/2018 11:00 PM	OSPApprover	Choose Person
#496	ELGIN, OLIVER	NIH	BL-IIDC	Testing routing		10/05/2018 11:00 PM	Testing Group	BORST, BARBRA ✕
#446	Cate, Allyson	NSF	000001	test PECK		08/08/2018 11:00 PM	OSPApprover	Choose Person
#424	MCAFEE, ALAN	Air Force	000001	Age Related Changes in Neural Coding		07/15/2018 11:00 PM	OSPApprover	SHIELDS, IVAN ✕

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KUALI HELPDESK: https://www.umass.edu/research/webform/kuali-help-desk