

## 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>

The screenshot displays the Kuali Research Dashboard interface. On the left is a dark sidebar with navigation links: Dashboard Home, Search, Common Tasks, All Links, Reports, Configuration, Feedback, Help, About, Logout, and McGreggor, Geoff. The main content area is titled 'Dashboard' and includes a 'Show/hide sections' button. It is divided into three main sections:

- Proposals Routing to Me:** A list of proposals with status indicators (e.g., 'You're up!', '1 step away') and details like proposal number, PI, sponsor, and due date.
- Proposals Not Routing:** A list of proposals that are not currently routing, with details like proposal number, PI, sponsor, and due date.
- Post Award In Progress & Negotiations:** A list of awards and subawards in progress or under negotiation, with details like award number, PI, sponsor, and due date.

## 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 Number	Principal Investigator	Sponsor	Unit	Title	Due Date	Last Action	Primary Approver	Assigned Approver
<a href="#">#531</a>	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
<a href="#">#526</a>	Chew, Inez	NIH	BL-IIDC	Func Review RESKC-3282		10/24/2018 11:00 PM	Testing Group	Chew, Inez
<a href="#">#524</a>	Chew, Inez	NIH	BL-IIDC	Testing Attachment Functionality		10/24/2018 11:00 PM	Testing Group	Chew, Inez
<a href="#">#464</a>	Cate, Allyson	NIH	BL-IIDC	Testing Proposal Creation		09/17/2018 11:00 PM	OSPApprover	Cate, Allyson
<a href="#">#519</a>	Chew, Inez	NIH	IN-CARD	Testing routing		10/22/2018 11:00 PM	Testing Group	Cate, Allyson
<a href="#">#508</a>	BURD, ALTHEA	Air Force Systems - SAMSO	IN-CARD	research project	10/30/2018 11:00 PM	10/11/2018 11:00 PM	Testing Group	<a href="#">Choose Person</a>
<a href="#">#463</a>	Cate, Allyson	NIH	BL-IIDC	Testing Proposal Creation		09/17/2018 11:00 PM	OSPApprover	<a href="#">Choose Person</a>
<a href="#">#496</a>	ELGIN, OLIVER	NIH	BL-IIDC	Testing routing		10/05/2018 11:00 PM	Testing Group	BORST, BARBRA
<a href="#">#446</a>	Cate, Allyson	NSF	000001	test PECK		08/08/2018 11:00 PM	OSPApprover	<a href="#">Choose Person</a>
<a href="#">#424</a>	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 GUIDES:** <https://www.umass.edu/research/kuali-guides>

**KUALI FAQs:** <https://www.umass.edu/research/kuali-research-faq>

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