Kent State University Kuali Research
Navigating the Kuali Dashboard

Kuali Research has implemented an updated interface that includes a new landing page, or dashboard. Upon logging into Kuali, users will see a screen like the one below, displaying two or four cards, depending on level of Kuali access.

Dashboard Cards

- **Proposals Routing to Me**: Shows any proposal for which the logged in user is in the approval routing. It will display if you are up for approval (proposal is in your Action List) or how many steps away it is. The card will also show if you are an alternate approver. Click the proposal in the card to review and approve. Once you do, the proposal will be removed from the card.
- **Proposals Not Routing**: Shows all active proposals for which the logged in user has View rights and that have not yet been routed for approvals. Once routed, the proposal will no longer display in this card.
- **Institutional Proposals work in progress** (*OSP only*): Shows any in-progress Institutional Proposal for which the logged-in user has View rights and that has not yet been finalized.
- **Awards work in progress** (*OSP only*): Shows any in-progress Award record for which the logged-in user has View rights and that has not yet been finalized.

Each user can configure which cards are visible to him/her by clicking the **Show/hide cards** button.

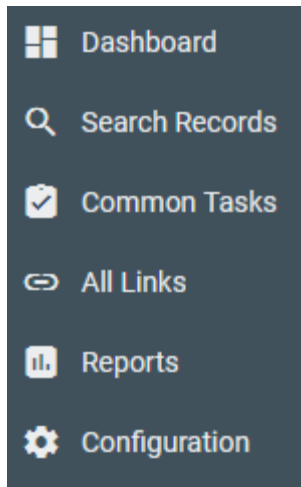

For example, users who are not approvers may want to hide the **Proposals routing to me** card.

For more information, see
https://kuali-research.zendesk.com/hc/en-us/articles/360011483814-Dashboard-Dashboard-Home

Navigation

Use the left-hand side menu to navigate to other sections of Kuali Research. Items available in this menu depend on the level of Kuali access. Click the arrow in the bottom left-hand corner to expand the menu and see item descriptions.

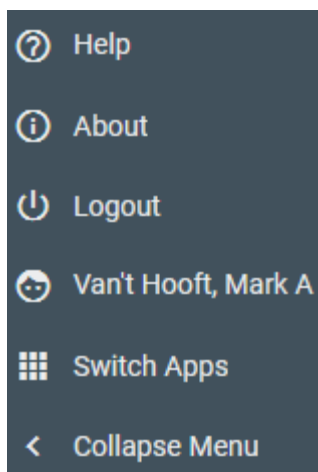**Dashboard**: Return to the main dashboard from anywhere in Kuali Research.

Search Records: Access omni search to search across all modules with any keyword or filter by a number of predetermined filters.

Common Tasks: Access list of most common tasks in Kuali Research.

All Links: Access all available links in the system; includes search option.

Reports: Access reporting tool (*limited access*).

Configuration: Access system configuration (*admin access only*).

Help: Initiates an email request to kuali-research-help@kent.edu

About: Displays current version info for Kuali Research.

Logout: Click to exit Kuali Research.

Profile: View user profile.

Click to expand (icons plus text) or collapse (icons only) the navigation bar.

For more information, see
https://kuali-research.zendesk.com/hc/en-us/articles/360011575473-Dashboard-Overview

Search Records

The dashboard includes omni search functionality that allows users to search across all modules using one or more criteria. The default is to search everywhere. Results will display any record that includes the entered value:

You can also search by a specific category using the dropdown menu of **Search Everywhere**:

Select one or more categories to filter first, then enter your search term.

For more information, see
https://kuali-research.zendesk.com/hc/en-us/articles/360029976374-Dashboard-Search-Records

Additional Kuali resources are available at: https://www.kent.edu/research/sponsored-programs/kuali-research.

If you have any dashboard-related questions or need assistance, please contact Sponsored Programs at 330-672-2070 or kuali-research-help@kent.edu.