Navigation in Kuali Research

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Navigation in Kuali Research

Kuali Research Dashboard

The Kuali Research Dashboard is the user interface for KR, which provides tools to manage and search for relevant records based on your own preferences and action list. The Dashboard also provides access to full search tools and common menu items for each module.

Dashboard Home Page

When you log in to Kuali Research, the system will display the Dashboard Home Page, which contains Dashboard cards and an expandable navigation bar that allows users to access various resources in Kuali Research.


Dashboard Cards

There are three dashboard cards that all relate to Proposal Development. Within each card, you may click on an item to open the record.

Collapse Menu

Collapse Menu (located in the lower left corner) allows you to expand the navigation bar to display the descriptions for each icon. This is helpful to familiarize yourself with the Dashboard Home page and you may choose to collapse the bar later and simply show the icons if you would like more screen space.

Filter

The filter allows you to limit the items shown in the dashboard card based on criteria you have selected. When you click on Filter, you will see a dropdown list of items for filtering.
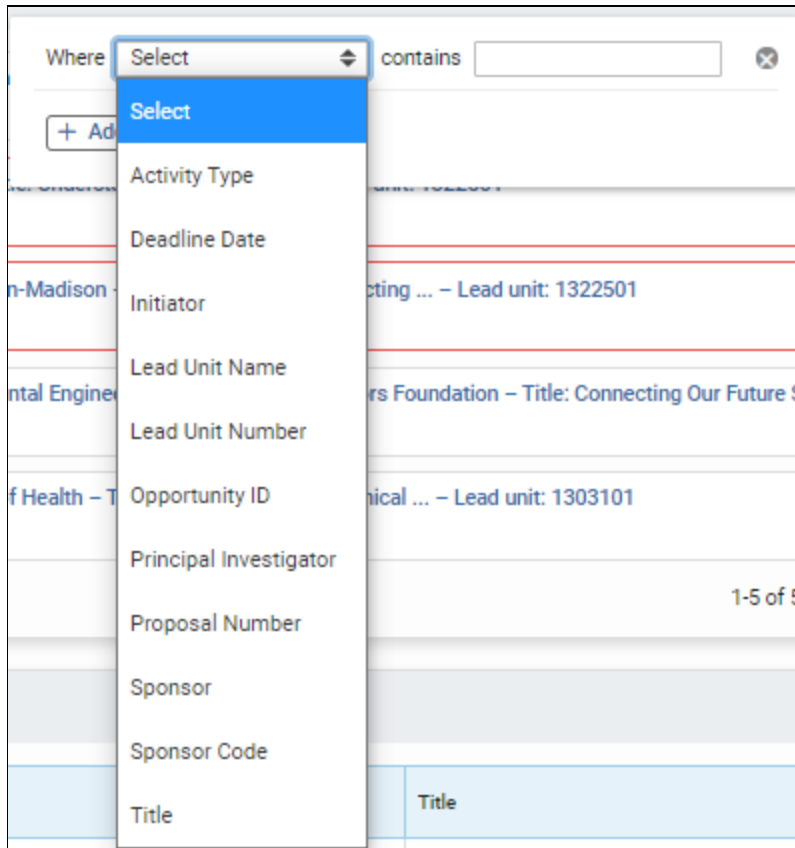
Select the item you want to filter on and type in the date desired for that item. The filter is automatically added. You can click on Add a Filter to add an additional filter. To remove a filter, click on the ⊗ on the filter line.
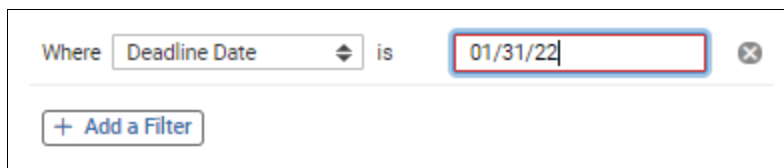
Show/Hide Cards The Show/Hide Cards button in the upper right corner allows you to select which cards you want to show or hide.

Navigation Bar

The Navigation Bar on the left allows you to navigate to various sections of Kuali Research.

|	
Dashboard	Returns to the Dashboard Home page.
Search Records	Search provides an all-in-one comprehensive search of Awards, Institute Proposals, Subawards, Development Proposals and other records.
Common Tasks	Displays the most common tasks for each module in KR, which includes accessing full searches for each module, creating new records, and has a link to your action list.
All Links	Displays links to various lookup tables for sponsors, organizations, and address book records as well as for commons tasks.
Help	Opens a new window with a generic help guide. Instead, use the resources on the SPA Kuali Research website: **https://www.umaryland.edu/kualicoeus/user-resources-and-help/**
About	Lists the current version of Kuali Research.
Logout	Allows you to log out of Kuali Research.
Miller, Carolyn LaLumiere	Displays the current user. If you click on this accidentally it will open up a new browser tab with your user information. You may simply close this tab and return back to your previous tab. You may also return back to Kuali Research by clicking on Switch Apps > Research Home.
Switch Apps	Allows you to switch to different apps in the Kuali Suite. Please only use the Research Home and return to Kuali Research.
Collapse Menu	Collapse Menu allows you to expand and collapse the navigation bar. When you expand you can see descriptions for each icon and when you collapse the bar you only see the icons for each item.

Common Tasks - Module Lookup Screens
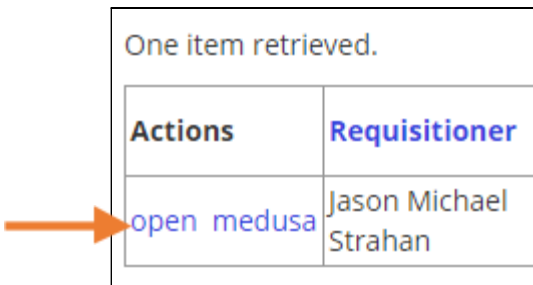
Each module lookup screen contains various criteria to search on. See Common Tasks - Lookup Screen Search Techniques for specifics on how to do a search. There are three buttons at the bottom of the search screen.

Search – performs search based on search criteria
Clear – clears previously typed search criteria
Cancel – returns to Kuali Research Dashboard page

Module Lookup Results List

When you click on search, the results list is displayed at the bottom of the lookup screen. If the item you are looking for is not in the results list, you can do another search from this screen.

Click on open to view the details of the item. Or click on medusa to see the information of related items. To open in a new window, do a CTRL/Open or right click on Open.

Module Detail Screen

Tabs

Click on a tab to see the detail for that tab.

Expand All/Collapse All

Within each tab, there are expand all and collapse all buttons at the far right.

Expand all – shows the detail for all of the panels on that tab.

Collapse all – collapses screen back to just the panels headers for each panel.
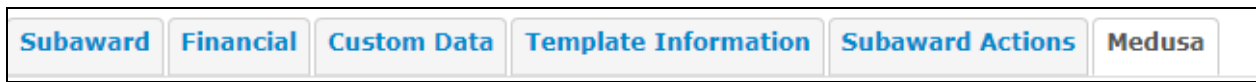
Show/Hide

On each panel header, there is a toggle button – Show/Hide.   If the panel detail is not showing, the Show button will allow you to see the detail. If the panel detail is showing, the Hide button will close the detail for that panel.

Close

There is a close button at the bottom of each detail screen. Clicking on close will return to the Kuali Welcome screen.

Browser Back/Forward Arrow

You can use the back and forward arrows on your browser for navigation. Because the Close button will return you to the Kuali Welcome screen, use the back arrow to return to the previous screen.

Detail Double Click

On any field that is blue, you can double click on it to get more detail on that value.

Open New Tab

To keep your current window on the screen it is on, right click on the Unit role. This will open a new tab at the same place. You can then navigate to a different section.

Special Icons

Indicates there is more information for this item. Click on to view the information.

Indicates that the detailed information for this item is available. Click on to view the details. There must be a value in the field in order for this to work.

On lookup screens, the indicates that you can do a specific search on that item and return the value to the lookup screen.

The link icon indicates that you can get the URL for this screen. Click on the to get the URL. You can then send it in an email, etc. to others; the URL will work only for those who have permissions to view the information in the link.

Common Tasks - Lookup Screen Search Techniques

Basic Searching

Across all the modules in Common Tasks, you may use the following techniques to perform searches on text fields.

Typing in search variables across multiple fields will act as an AND operator.

Clicking on the 🔍 next to a search field will do a secondary lookup for that particular item.

You may optionally use additional search operators below to further limit your results.
NOTE: These do NOT apply to the all-in-one "Search Records" page.

Operator	Name	Example	Comment
*	Wildcard Any Char	Title: *apple*	Search for "apple" anywhere in the title, regardless of number of characters
		Title: apple*	Search for "apple" at the beginning of the title
		Title *apple	Search for "apple" at the end of the title
?	Wildcard One Char	Title: ?ffect* OR Unit ID: ????????	Search for a word that has any one character that precedes "ffect" (e.g. "affect" or "effect") in the beginning of a title Search for all UMB items - use 8 question marks
| (Vertical Bar)	OR	Lead Unit: *apple*|*orange*	Search for "apple" OR "orange" in any order
&&	AND	Title: *apple*&&*honeycrisp*	Search for "apple" AND "honeycrisp" in any order
!	NOT	Title: *apple*&&!*tree*	Search for "apple" but not "tree"
..	SERIES	Lead Unit: 1330101..1330103	Search records with Lead Unit from "1330101" to "1330103" (Just like combining Greater Than or Equal to and Less Than or Equal to)
>	GREATER THAN	Lead Unit: >1330101	Search records with Lead Unit Greater than "1330101"
>=	GREATER THAN OR EQUAL TO	Lead Unit: >=1330101	Search records with Lead Unit Greater than or Equal to "1330101"
>	LESS THAN	Lead Unit: <1330101	Search records with Lead Unit Less than "1330101"
>=	LESS THAN OR EQUAL TO	Lead Unit: <=1330101	Search records with Lead Unit Less than or Equal to "1330101"
	SERIES	Lead Unit: >=1330101&&<=1330103	Just Like SERIES (..) above. Search records with Lead Unit from "1330101" to "1330103"

Note: To ensure you get a complete set of UMB records returned, type in ???????? in Unit ID. Due to KR logic and the results being limited to 500 records, leaving this field blank may cause KR not to return all records.

For items that have a 🔍 on the right, you can click on the 🔍 to do a search on that item and return a desired value.

Sponsor ID: [   ] 🔍📖

Clicking on the 🔍 leads to the Sponsor Lookup screen.

Sponsor Lookup❷

Sponsor Code:	[|]
Sponsor Name:	[ ]
Acronym:	[ ]
Sponsor Type Code:	[▾] 🔍📖
DUN And Bradstreet Number:	[ ]
DUNS Plus Four Number:	[ ]
DODAC Number:	[ ]
CAGE Number:	[ ]
Postal Code:	[ ] 🔍📖

When a search is completed, the results list shows at the bottom of the screen.

29 items retrieved, displaying all items.

Return Value	Sponsor Code	Sponsor Name	Acronym	Sponsor Type	DU Nu
return value	000002	National Institutes of Health	NIH	Federal	
return value	000003	National Institute on Aging	NIA	Federal	
return value	000004	National Institute of Allergy and Infectious Diseases	NIAID	Federal	
return value	000005	National Institute of Arthritis & Musculoskeletal & Skin Diseases	NIAMS	Federal	
return value	000007	National Institute of Child Health and Human Development	NICHD	Federal	

Click on return value to return that selection to the original Lookup screen.

Sponsor ID: 000002

Open Book Icon
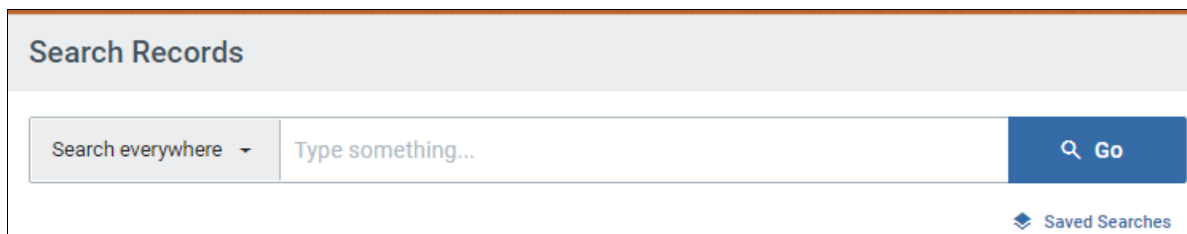
When you type or select a value in a field that has the , you can click on it to find out the details about that value through a pop-up.

Sponsor ID: 000500

Sponsor

Sponsor	▾ hide
Sponsor Code:	000500
Acronym:	NSF
Audit Report Sent For Fy:	
CAGE Number:	4400
Country Code:	United States
DODAC Number:	
DUN And Bradstreet Number:	074811803
DUNS Plus Four Number:	
Owned By Unit:	University of Maryland
Postal Code:	22230
Address Book Id:	11745
Sponsor Name:	NSF
Sponsor Type:	Federal
State:	VIRGINIA

Search Records Page

The Search Records page provides a comprehensive all-in-one search of Awards, Institute Proposals, Subawards, Development Proposals, and other records based on your search criteria. It is most useful when you need to search across multiple document types (Award, Institute Proposal, Subaward, etc.).

NOTE: The traditional full search tools are useful when you want to search within each module (Award, Institutional Proposal, Subaward, Proposal Development, etc.). To utilize the full search tools, navigate to the Common Tasks page and click on the search option under the appropriate module.

How do I search?

Type in your search criteria and click "Go" or press enter to initiate a search.

- You may type in one word or a combination of words.
- You may use the search operator "-" to remove specific values from your results.
- You may use double quotes for phrases or strings of text (e.g., "apple tree," "301000-00001") but not with search operators.
- You cannot search multiple values of the same item simultaneously (e.g., acct 5212345 and acct 4301234).
- Keep in mind, when performing a search, it may return results that contain only a portion of that value (e.g., searching 320101 and will match with 1320101).

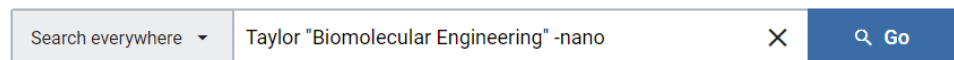**Below are some example of simple searches:**

Doing a broad search by name may result in too many results.

You can add the document type of the desired records in the search to help limit your results by module.

Try adding additional search terms in phrases and excluding what you don't want with a "-"

Search for award numbers using quotes (otherwise, the search will misinterpret the "-").

Search by the first 6 characters of an award family to return parent and children (-00001, -00002, etc.)

Searching by account number will return and awards and subawards funded by that account number.

| Search everywhere ▾ | 4325930 | ✕ | 🔍 Go |

Narrow Search by category

Narrow your searches by clicking on the "Search everywhere" drop-down to see a list of all the available searchable categories and select one. This will allow you to target which columns you'd like to search within using specific values instead of searching across all columns. If you are getting lots of unwanted results, using the category limits here is highly recommended.

Once you choose the category, type in the desired search value then, click enter or "Go."

| ✕ Search Lead Unit | 1320101 | ✕ | 🔍 Go |

You will now see that the search variable has been slotted below the search bar.

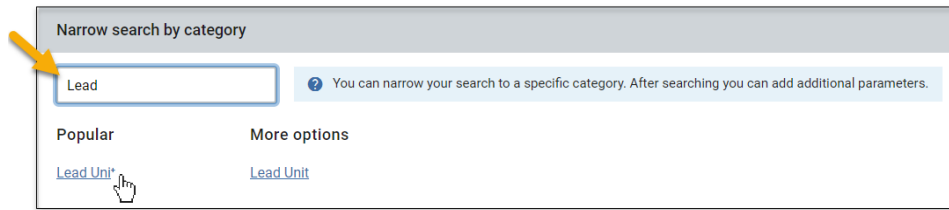| Search everywhere ▾ | Type something... | 🔍 Go |

Lead Unit: 1320101 ✕   Clear All

If you want, you may continue to narrow down your results further by adding additional categories. Just repeat the process of selecting a category, entering the desired value, and clicking "Go" or enter.

| Search everywhere ▾ | Type something... | 🔍 Go |

Lead Unit: 1320101 ✕   Document Type: InstitutionalProposal ✕   Clear All

NOTE: If you'd rather not look through the categories, you may also filter it by typing keywords.

Narrow search by category

Lead

❓ You can narrow your search to a specific category. After searching you can add additional parameters.

Popular   **More options**

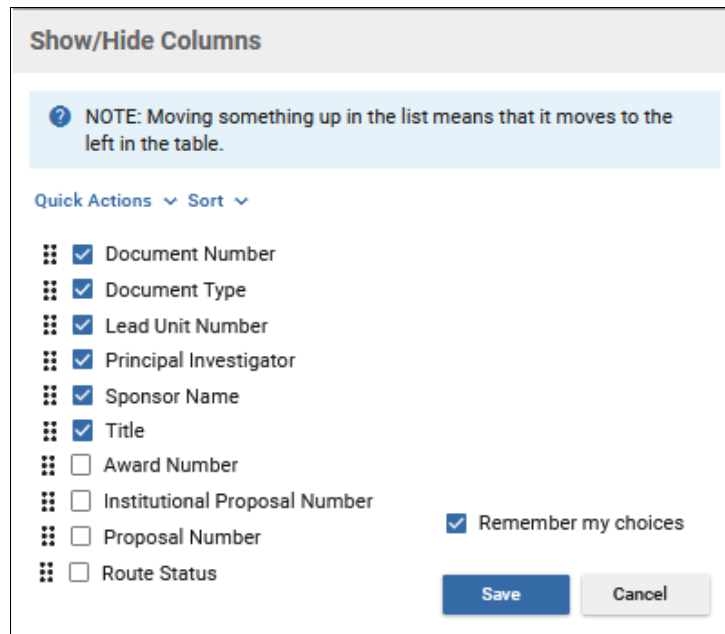Lead Uni*   Lead Unit

Show/Hide Columns

After you've performed a search, you will see a "Show/Hide Columns" button available, which allows you to select which columns you want to be visible in your search results. The button is located on the search results screen's far-right and appears only after your initial search results are displayed.

⊙ Show/Hide Columns

Adding Columns

If you check a column checkbox, it will be visible in your search results.   By default, "Remember my choices" at the bottom of the list is checked, which will save the columns displayed but is limited to the browser and computer you are using.

You may manually reorder your results by clicking on the six dots

⠿ by a column and dragging and dropping to the desired location.

Show/Hide Columns

❓ NOTE: Moving something up in the list means that it moves to the left in the table.

Quick Actions ∨ Sort ∨

⠿ ☑ Document Number
⠿ ☑ Document Type
⠿ ☑ Lead Unit Number
⠿ ☑ Principal Investigator
⠿ ☑ Sponsor Name
⠿ ☑ Title
⠿ ☐ Award Number
⠿ ☐ Institutional Proposal Number   ☑ Remember my choices
⠿ ☐ Proposal Number
⠿ ☐ Route Status

Save   Cancel

Quick Actions

If you click on "Quick Actions," you can select or deselect all columns or restore the original defaults.

Quick Actions ∨ Sort ∨

Select all

Deselect all

Restore to my institution's defaults
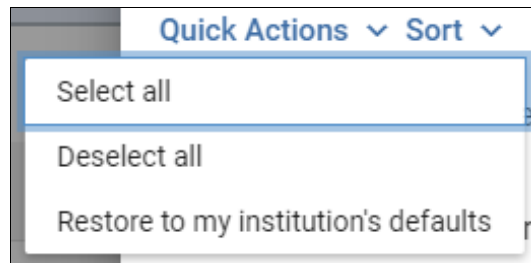
Sort Drop-Down

Clicking on "Sort" allows you to move all the checked columns together at the top for readability or sort A-Z, Z-A. The higher a column is on the list, the more leftmost it will be in your search results.
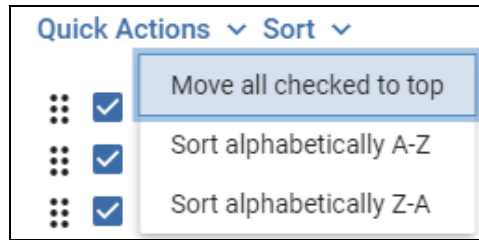
Multiple Rows for the Same Institute Proposal, Award, or Subaward

As ORA makes updates to records throughout the day on Institute Proposals, Awards, and Subawards your search results may show the same item twice in two unique situations. Below are a few tips to help you decide which one would be best to view, but if you're not sure, you can always do a full search in the appropriate module by visiting the Common Tasks page, which will show one result per record.

Currently Being Updated
If ORA is in the process of updating a record, you will see that one item has a Route Status of "FINAL" and one item has "SAVED." You will want to view the current record in a "FINAL" route status in this case. (You can add Route Status as a column in Show/Hide Columns above your search results)

Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
Award	Doe, Jane	USDA-Agricultural Research Service	3200001	5200321	000789-00001	FINAL
Award	Doe, Jane	USDA-Agricultural Research Service	3610008	5200321	000789-00001	SAVED

Recently Updated and Finalized that Day
If ORA just recently updated a record that day, you may see two results that both have a "FINAL" Route Status. In this situation, you will want to open the higher of the Document Numbers you see listed here. NOTE: This is a temporary artifact after ORA finalizes an update. A nightly process cleans these duplicate entries up, and the next day there will be only one result instead of two.

Document Type	Principal Investigator	Sponsor Name	Document Number	Account Id	Award Number	Route Status
Award	Doe, John	NSF	3380001	5200123	000123-00001	FINAL
Award	Doe, John	NSF	3955432	5200123	000123-00001	FINAL

Search Tips!
Use the "Search Everywhere" dropdown to limit your results by category if too many items are listed. Narrowing down results with this flexible tool will allow you to perform targeted searches.

In your search results, click on the Column Headers to sort any column in A-Z or Z-A order.

Based on what your criteria are, you may want to change the columns that are displayed in your results to be er suit your returned results via the Show/Hide Columns bu on.

Use mul ple words or a phrase with quotes in the "Search Everywhere" field to narrow your search down as needed. Phrases with quota ons cannot be used in Category limits.

Using the "*" as a wildcard to search is superfluous. You can enter a short string to simulate the same type of query within the search bar OR in a category. For example, searching "cano" will return results for "Canon", "canopies", "Canonical", etc.

Search results do not include canceled development proposals. Use the Common Tasks page to view the Proposal Development Full Search screen and retrieve a proposal that was canceled.

When searching by an award number, use the first six digits to pull all awards within a family or enter an award number in quotes to pull results based on that single award.

Column Suggestions

After performing searches, you may feel that you are missing some key fields that would help you differentiate records from each other, or you may find it challenging to understand why you are getting certain results. Adding more Columns to display in your search results with the "Show/Hide Columns" tool can help in successfully navigating your returned results. We have listed some suggestions below based on the document type. You can mix and match or use any of the other available fields to suit your needs better.

Awards

- ☑ Document Type
- ☑ Account Id
- ☑ Award Number
- ☑ Sponsor Number
- ☑ Lead Unit Number
- ☑ Principal Investigator
- ☑ Sponsor Name
- ☑ Title
- ☑ Start Date
- ☑ End Date
- ☑ Status
- ☑ Route Status
- ☑ Document Number

NOTE: Sponsor Number is the Sponsor Award ID.

Institute Proposals

- ☑ Document Type
- ☑ Institutional Proposal Number
- ☑ Lead Unit Number
- ☑ Principal Investigator
- ☑ Sponsor Name
- ☑ Title
- ☑ Start Date
- ☑ End Date
- ☑ Status
- ☑ Route Status
- ☑ Document Number

Subawards

- ☑ Document Type
- ☑ PO Number
- ☑ Subaward Id
- ☑ Subrecipient
- ☑ Requisitioner
- ☑ Lead Unit Number
- ☑ Title
- ☑ Start Date
- ☑ End Date
- ☑ Status
- ☑ Route Status
- ☑ Document Number

Development Proposals
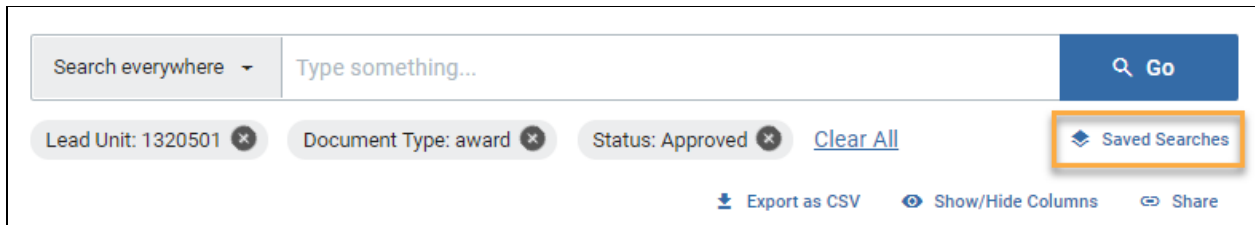
- ☑ Document Type
- ☑ Proposal Number
- ☑ Lead Unit Number
- ☑ Principal Investigator
- ☑ Sponsor Name
- ☑ Title
- ☑ Start Date
- ☑ End Date
- ☑ Status
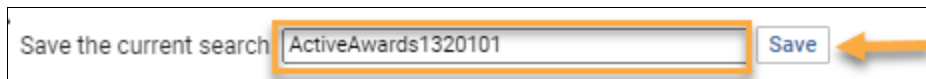- ☑ Deadline Date
- ☑ Document Number

Saved Searches

You can save/retrieve searches via the Saved Search button.

To save a search, put together your search criteria, then click on Saved Searches.

Type in a name for the search and click on Save
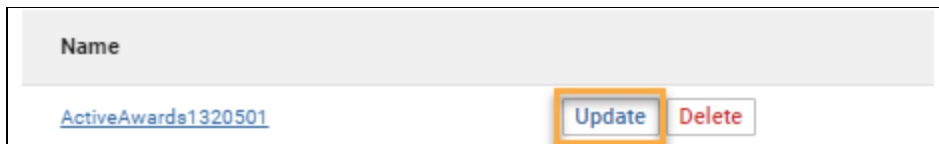
When you have one or more searches saved and you click on Saved Searches, you will see your searches. To run the search, click on the search name. To remove the saved search, click on Delete.
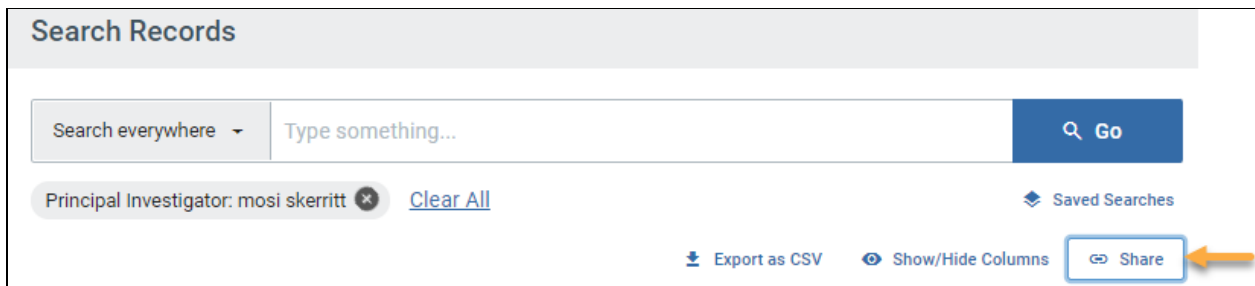
Update a Saved Search

To update a Saved Search, you must first run the saved search. Note that the Update button is initially greyed out. With the saved search results, make your changes to the search. Click on Saved Searches and click on the Update button.

Share a Search

To share a search, click on the Share button.

Click on Copy URL. You can then send this URL to the others who can run it and if desired, save it to their Saved Searches. As always, any search results are limited to what permissions the user has.