

## Your Dashboard in Kuali

September 2020

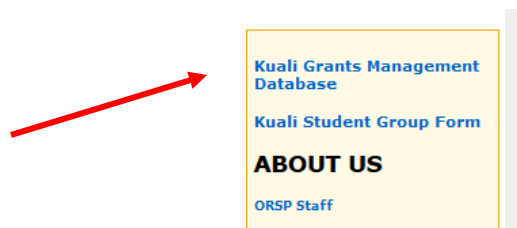
**Purpose:** To understand the process for viewing and using the dashboard feature in Kuali. The Dashboard will make it easier to see what proposals you have in progress and which proposals need your attention. There are also cards on the dashboard to show you information about awards and subawards that are in progress.

### STEP 1: Accessing Kuali

From the ORSP Website or [grants.mu.edu](http://grants.mu.edu).

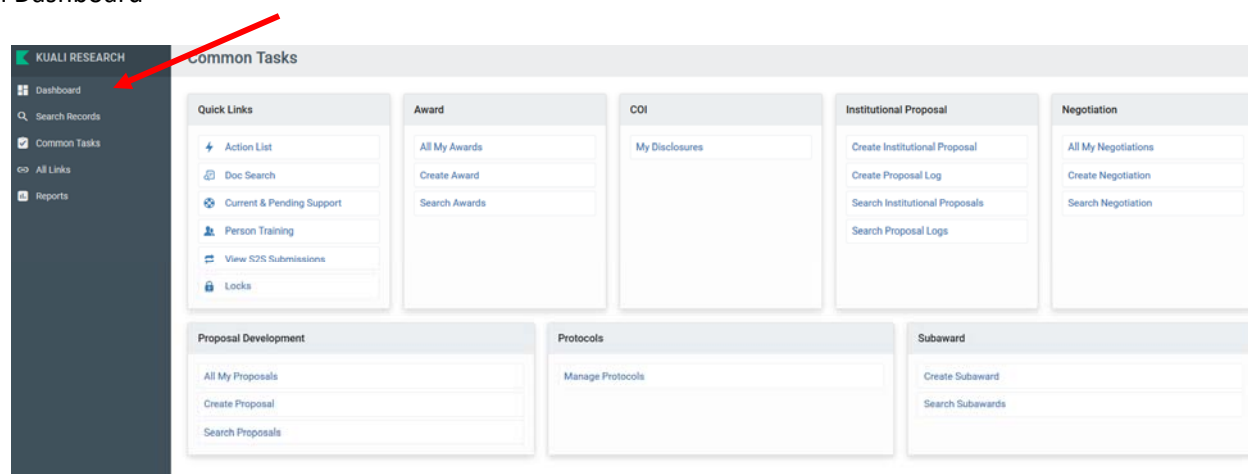
Log in using your Marquette credentials.

From the [Research and Innovation](#) website.



### STEP 2: Common Tasks Screen (Kuali Research Landing Page)

Click on Dashboard



### STEP 3: Dashboard

The dashboard consists of 6 cards or boxes with information pertinent to you and your role as a PI or approver in the Kuali system. These cards contain quick links giving you easy access proposals requiring your attention.

**PROPOSALS ROUTING TO ME:** This card will display any proposal that involves you in the approval process. It will display if you're up for approval or how many steps away in the routing process it is until it gets to you. It will also let you know if you're an Alternate approver on the proposal rather than the primary approver. You can click on the row in the card to open the record and take the necessary action – the proposal will open in the summary/submit screen for that particular application.

Proposals routing to me		Sort by ▾
You're up! Alternate	Proposal #1436 – PI: POND, MITZI – Sponsor: NIH – Title: cost share routing test – Lead unit: IN-C... Due date: None Last action: Administrator, Application; 6/16/20 9:51 AM	
You're up! Alternate	Proposal #1439 – PI: Tester, Joe – Sponsor: NIH – Title: NEW NIH FormsF test R01 s... – Lead unit... Due date: None Last action: McGregor, Geoff; 6/16/20 11:14 AM <span>Compliance</span>	
You're up! Alternate	Proposal #1453 – PI: MARTIN, AUDREY – Sponsor: NIH – Title: Phoenician Shipping Vesse... – Le... Due date: None Last action: McGregor, Geoff; 7/21/20 8:03 PM <span>Compliance</span>	
You're up! Alternate	Proposal #1467 – PI: Cate, Allyson – Sponsor: NASA - Washington – Title: test 424a PECK – Lead... Due date: None Last action: McGregor, Geoff; 7/07/20 5:25 PM	
1 step away Alternate	Proposal #971 – PI: admin, admin – Sponsor: NIH – Title: RESKC-3740 Func Review – Lead unit: L... Due date: None Last action: McGregor, Geoff; 7/02/19 2:33 PM	

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**PROPOSALS NOT ROUTING:** This card will show you all proposals that are saved/initiated but not yet submitted into the approval/routing process. It will display all proposals where the user has view rights for the given proposal. Once the proposal is submitted into routing it will no longer be displayed in this card.

This card is helpful to see which proposals are in process.

Proposals not routing		Sort by
Proposal	Proposal #1477 - PI: McGregor, Geoff - Sponsor: NIH - Title: ascdas - Lead unit: 000001 Due date: None Last action: McGregor, Geoff; 7/16/20 8:39 PM <span>Compliance</span>	
Proposal	Proposal #1475 - PI: Rabbit, Roger - Sponsor: NIH - Title: Testing COI Notifications - Lead unit: L... Due date: None Last action: McGregor, Geoff; 7/10/20 12:58 PM	
Proposal	Proposal #1474 - PI: FLAHERTY, ANGELICA - Sponsor: NSF - Title: Test PD - Lead unit: 000001 Due date: None Last action: McGregor, Geoff; 7/10/20 8:29 AM <span>Compliance</span>	
Proposal	Proposal #1473 - PI: FLAHERTY, ANGELICA - Sponsor: NSF - Title: Test PD - Lead unit: IN-CARD Due date: None Last action: McGregor, Geoff; 7/10/20 8:03 AM	
Proposal	Proposal #1472 - PI: FLAHERTY, ANGELICA - Sponsor: NSF - Title: Test PD - Lead unit: 11111111... Due date: None Last action: McGregor, Geoff; 7/10/20 7:56 AM	

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### Work in progress cards – Primarily used by ORSP

The **Institutional Proposals work in progress, Awards work in progress, and Subaward work in progress** cards will show you all Institutional Proposal, Award, and Subaward records that are saved/initiated but not finalized. It allows you to view documents that are still outstanding and need to be submitted. It will display all records where the user has view rights for the given document. ORSP manages these modules and has the ability to edit, save and finalize the records.

Institutional Proposals work in progress		Sort by
Institutional Proposal	Institutional Proposal #00042637 - PI: Danduran, Michael - Sponsor: Medical College of Wisconsin ... <span>Pending</span> Last action: Dorff, Sherrie; 10/21/19 2:43 PM <span>Compliance</span>	
Institutional Proposal	Institutional Proposal #00022260 - PI: Fiedler, Adam - Sponsor: National Institutes of Health - Title... <span>Funded</span> Last action: Wilcox, Angela; 9/09/19 12:34 PM	
Institutional Proposal	Institutional Proposal #00027994 - PI: Wall, Joseph - Sponsor: IMA Research Foundation - Title: St... <span>Funded</span> Last action: Ploszay, Barbara; 8/06/19 9:52 AM	
Institutional Proposal	Institutional Proposal #00029762 - PI: Woods, Douglas - Sponsor: HabitAware - Title: Technology ... <span>Funded</span> Last action: Ploszay, Barbara; 2/10/20 10:20 AM	

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Awards work in progress		Sort by
Award	Award #000115-00001 - PI: VandeVusse, Leona - Sponsor: Bureau of Health Professions - Title: Cr... <span>Closed</span> Last action: Ploszay, Barbara; 4/02/20 2:44 PM	
Award	Award #000832-00002 - PI: Quade, Stephanie - Sponsor: The Burke Foundation - Title: Burke Scho... <span>Active</span> Last action: Ploszay, Barbara; 4/29/20 6:58 AM	
Award	Award #001030-00001 - PI: Haglund, Kristin - Sponsor: Southeast Wisconsin Nursing Research Co... <span>Closed</span> Last action: Ploszay, Barbara; 8/19/20 8:17 AM	
Award	Award #001141-00002 - PI: Papanek, Paula - Sponsor: U.S. Department of Health and Human Servi... <span>Closed</span> Last action: Tormala-Nita, Rosita; 5/08/20 3:53 PM	
Award	Award #001141-00003 - PI: Papanek, Paula - Sponsor: U.S. Department of Health and Human Servi... <span>Closed</span> Last action: Tormala-Nita, Rosita; 5/08/20 3:57 PM	

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Subawards work in progress		Sort by
Sub Award	Sub Award #3 - PI: Kovriguine, Evgueni - Sponsor: None - Title: None - Lead unit: 385 <span>Void</span> Last action: Kirsch, Sherri; 2/23/18 2:50 PM	
Sub Award	Sub Award #60 - PI: None - Sponsor: None - Title: None - Lead unit: 355 <span>Void</span> Last action: Cox, Robin; 11/08/18 3:03 PM	
Sub Award	Sub Award #91 - PI: Papanek, Paula - Sponsor: None - Title: Families Inspired Togethe... - Lead unit: 325 <span>Pending</span> Last action: Kirsch, Sherri; 9/10/19 2:12 PM	
Sub Award	Sub Award #93 - PI: Barnes, Stacy - Sponsor: None - Title: Geriatrics Workforce Enha... - Lead unit: 361 <span>Active</span> Last action: Schmaus, Natalie; 9/11/19 12:19 PM	
Sub Award	Sub Award #103 - PI: None - Sponsor: None - Title: Preparing Urban Milwaukee... - Lead unit: 2650 <span>Active</span> Last action: Wood, Faith; 12/10/19 11:50 AM	

## STEP 4: Dashboard Configuration

Within the Dashboard Home link individual users can set their own preferences of what displays in the Dashboard Main sections.

The Show/hide sections button in the top righthand corner gives users a toggle window to display what's in their personal Dashboard Main page. They will only have card options that are configured globally in Dashboard Configuration and also given with card level permissions as explained above. These settings only apply to the specific user.

Each card has Sort by options in the top right hand corner so you can change the default sort logic and it will save the selected preference for each user.

