Office of Research and Sponsored Programs

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Your Dashboard in Kuali   **September 2020**
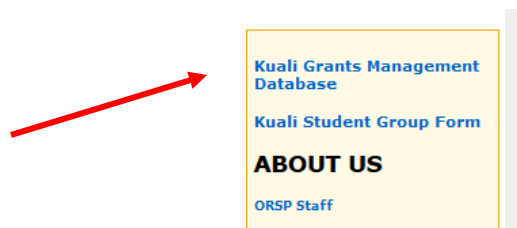
Purpose: To understand the process for viewing and using the dashboard feature in Kuali. The Dashboard will make it easier to see what proposals you have in progress and which proposals need your attention. There are also cards on the dashboard to show you information about awards and subawards that are in progress.

Kuali Grants Management Database

Kuali Student Group Form

ABOUT US

ORSP Staff

STEP 1: Accessing Kuali
From the ORSP Website or **grants.mu.edu.**
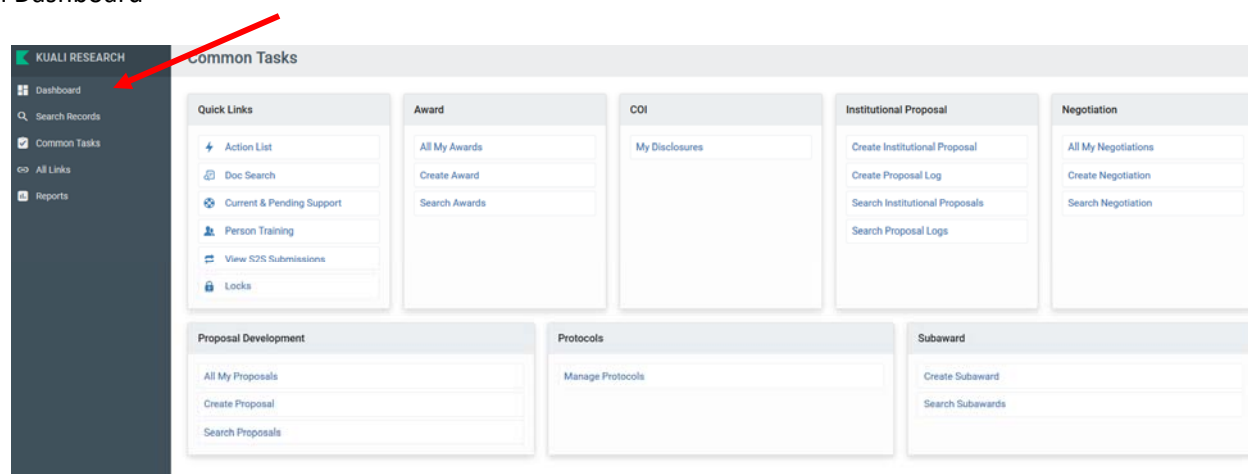Log in using your Marquette credentials.
From the Research and Innovation website.

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.

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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.

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.

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.

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