Kuali Research – Research Home Dashboard & navigation
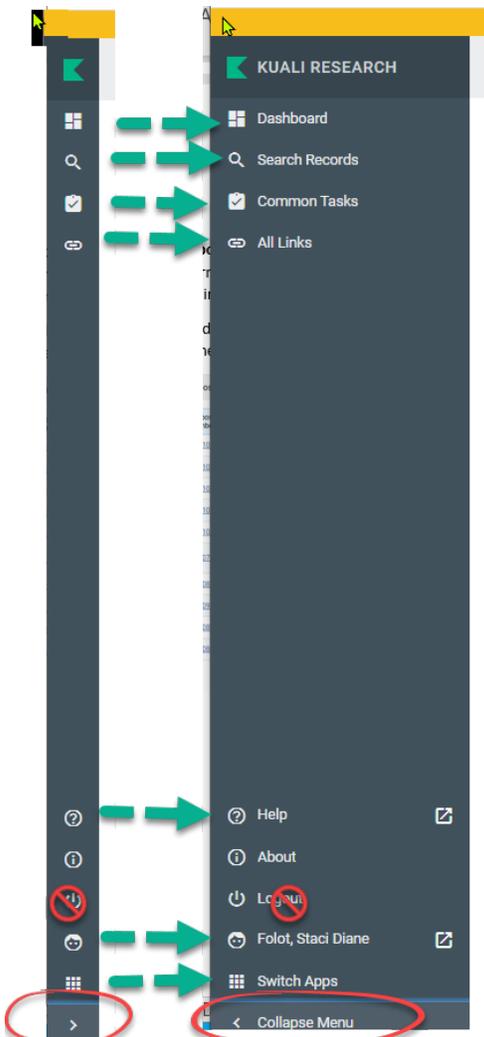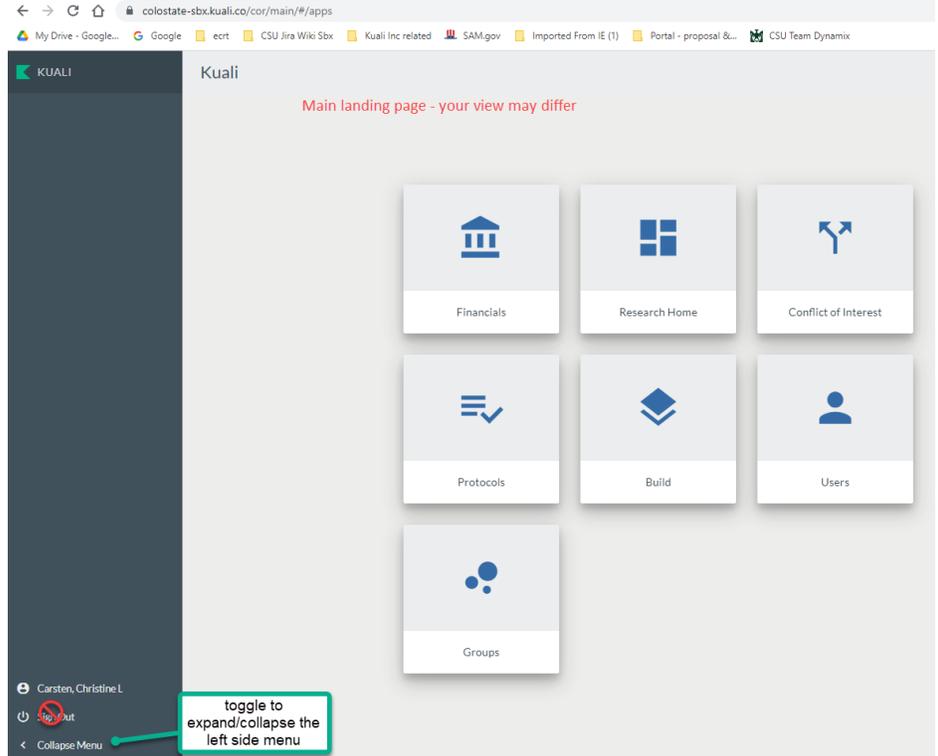
NOTE: Kuali Research login requires CSU NetID and password, but does NOT require a VPN (Global Protect) session

- Main Kuali apps landing page URL -- https://colostate.kuali.co/cor/main/#/apps/

Navigation overview

The main Kuali apps landing page will have tiles for the applications your role/permissions give you access to.
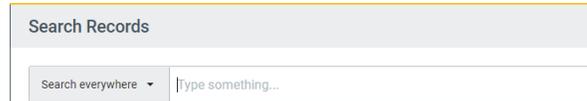
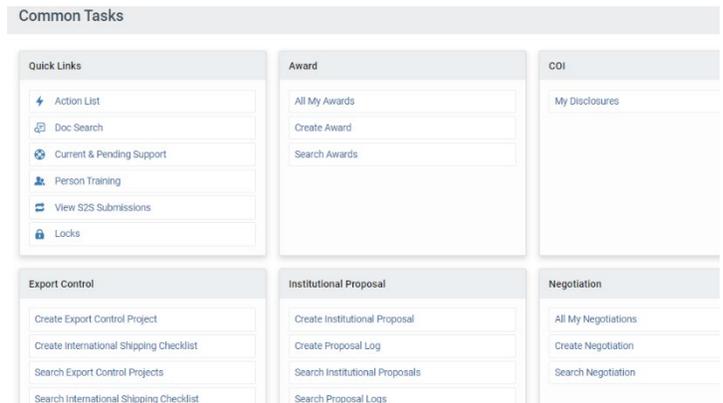- Choose **Research Home** to get to the Research Dashboard.

Left side navigation

Use the toggle at the bottom of the menu to collapse and expand the left side navigation. When collapsed, all menu items are still available, but show only simple icons. The content of the menu does not change when collapsed.
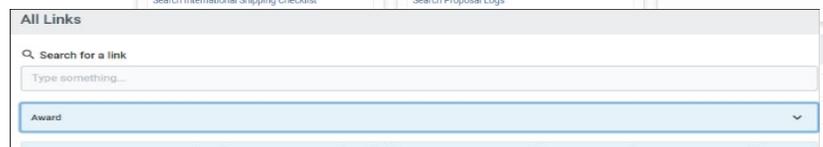
Search Records:

Common Tasks:

All Links:

NOTE: the Logout button is very quirky (doesn't actually log you out of anything), so don't use.

Dashboard is the landing page for all Research users.

You can control what cards you see on the Dashboard. Click the **Show/hide cards** button to expand the right side card options.

Use the sliders for each module to show or hide a card.

Who sees what on each card

Proposals routing to me –
- WHO: All named key personnel, members of the lead unit pre-approver group, the department approver group, the college approver group, the OSP administrator for the proposal lead unit and everyone in the OSP proposal approver group ('Alternate')
- WHAT: proposals in routing. The line item will display 'step' information, e.g., 'You're Up' or '3 steps away'.
  - There are 5 steps in 'normal' routing
    - "You're Up" means the proposal is ready for the logged-in user's action

Proposals not routing
- WHO: Logged-in user who created a PD record (initiator), key personnel, or department administrator with edit or view access; everyone in OSP
- WHAT: Proposal Development records that are 'in progress' (not yet routed), regardless of record content (e.g., there is no 'deadline date' requirement to see a record on this card).

Institutional Proposals work in progress
- WHO: Logged-in user who has view or edit access (e.g., Unit Aggregator with IP view permission) for IP

- WHAT: IP (institutional proposal) records that are in the process of being edited – SAVED status
- ➢ **NOTE**: CSU-Pueblo is using Institutional Proposal module, so their saved proposals will also show up on this card

Awards work in progress
- WHO: Logged-in user who has view or edit access to Award module
- WHAT: Award records in 'SAVED' status. (It is very rare to have records in this status for any length of time)

Subawards work in progress
- WHO: Logged-in user with view or edit access for Subaward module
- WHAT: Subaward records in 'SAVED' status

Negotiations
- WHO: Logged-in user with view or edit access for Negotiations module
  - o Campus view: PI for an associated IP or Award or user with the View Negotiations role
- WHAT: 'in progress' records – full record if the link is clicked; Show Activities to see only the activity list

Proposal Workload Assignments
- WHO: everyone who can open Kuali Research applications
- WHAT: Proposals in routing

NOTE: All cards can be filtered to find groups of records or specific records. This is an example of a deadline date filter on the proposals routing card, which also shows the route log 'step' information:

Cards can also be sorted by criteria applicable to the content of the card. This is an example of sort options for the Proposals routing card:

Proposal workload assignments will be 'read-only' but visible for all campus users. Having this card turned on will give you information about the current list of proposals in routing, what route stop the record is at, and if a specific OSP administrator has been assigned. (OSP SRAS and RAs will be discussing how best to use this tool.)

The default sort is by last action, in reverse date order. You can click on any column heading to sort by a different data element, e.g., Due Date

Proposal Number	Principal Investigator	Sponsor	Lead Unit	Title	Due Date	↓ Last Action	Current Request(s)	Assigned Approver
#151022	Admin, KFS	HHS-NIH-Arthritis, Musculoskel, and Skin	CO-1878	KS TEST PD - Migration #4 Testing	10/31/2021	10/26/2021 11:43 AM	All Personnel	
#151035	Admin, KFS	HHS-NIH-Arthritis, Musculoskel, and Skin	CO-1878	Custom Data to IP Test - KS	10/31/2021	10/22/2021 7:34 AM	Admin, KFS	
#151034	Admin, KFS	HHS-NIH-Arthritis, Musculoskel, and Skin	CO-1878	Custom Data to IP Test - KS	10/31/2021	10/22/2021 7:24 AM	Admin, KFS	
#151033	Reynolds, Andrew	NSF-National Science Foundation	CO-2002	TEST Proposal 03	10/31/2021	10/20/2021 3:05 PM	Stahle, Ashley	
#151024	Wilson, Tyler	Colorado Ski Country, USA	CO-2010	TJW Action List Test	10/31/2021	10/08/2021 2:07 PM	Wilson, Tyler J	McIntyre, Emily
#150734	Herber, Daniel	University of Illinois	CO-1377	LEAP HI: GOALI: Scientific Foundations for 3D Spatial Packaging of Interconnected Systems with Physical Interactions (SPI2)	09/13/2021	10/01/2021 9:47 AM	College Unit Approvers	
#150827	Schauer, Grant	HHS-NIH-Nat Inst of General Medical Sci	CO-1870	Bypass Mechanisms in Eukaryotic Replication	10/04/2021	10/01/2021 9:35 AM	Proposal OSP Approvers	McIntyre, Emily
#150916	Thamm, Douglas	University of Michigan	CO-1678	Circulating tumor cell capture with a wearable indwelling, intravascular apheretic device	09/24/2021	10/01/2021 9:32 AM	Proposal OSP Approvers	
#150899	Nishimura, Erin	Life Sciences Research Foundation	CO-1870	Caenorhabditis Elegans: a Model for Genetic Interaction between Gut Microbiota and Intestinal Cells	10/01/2021	10/01/2021 9:26 AM	All Personnel	
#150846	Hollinshead, Fiona	Grayson-Jockey Club Research Foundation	CO-1678	Evaluating extracellular vesicles from equine fetally-derived mesenchymal stem cells as an endometritis therapeutic	10/01/2021	10/01/2021 9:23 AM	Proposal OSP Approvers	

Rows per page 10 ⌄ 1-10 of 71 ‹ ›

Search Records

- Searches across all modules
- Results and access controlled by permissions & roles
- Saved searches can be re-used and shared

default appearance -- can type in the field, or choose from categories using the dropdown in Search everywhere box

Common Tasks:

- Cards organized by 'Quick Links' and modules
- Most commonly used links for each module, not all links
- Action List, Doc Search, and Lock search on this page

All Links

- Module, maintenance, system admin links
- Searchable
- Person lookup link on this page

Training environment

To see the dashboard and navigation in the TEST environment:

- Kuali Inc Cloud SBX (sandbox) URL: https://colostate-sbx.kuali.co/cor/main/#/apps/

Contact the OSP ERA team if you get an 'unauthorized access' message in the SBX environment