KUALI RESEARCH
COLORADO STATE UNIVERSITY

**Kuali Research Quick Reference Guide**
Navigation Basics

Overview:

This Quick Reference describes the basic navigation functions, icons used, action buttons, and keyboard navigation found in Kuali Research.

For new or casual Kuali Research Users who view, review, or approve proposals and budgets.

Procedure:

Click on any of the listed options in the left navigation panel to open and view the desired screen.
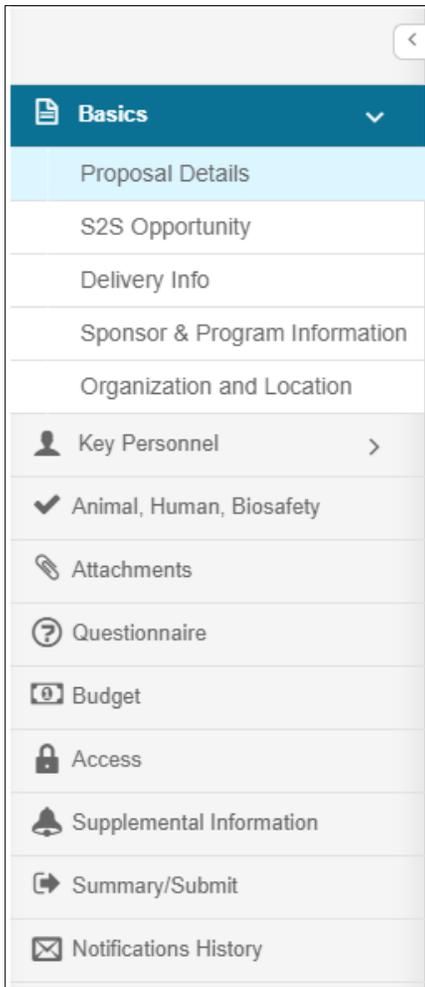
Some options act as category headers, denoted by the triangle on the far right (ex. Basics and Key Personnel)
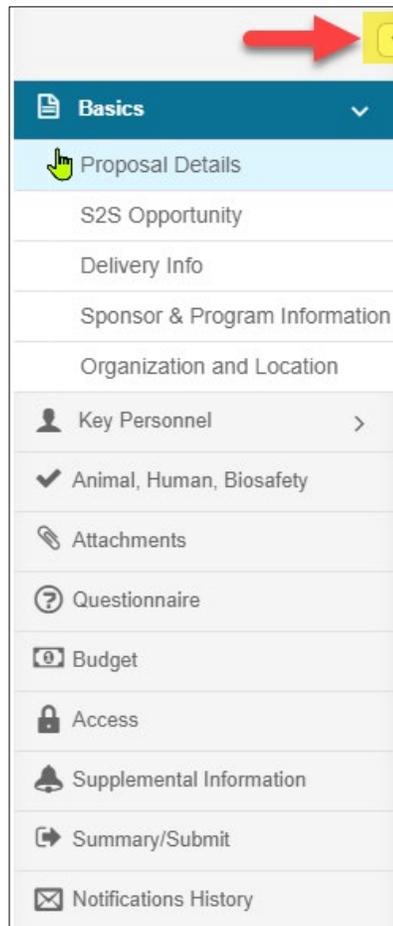
- Clicking on the **category header** when the triangle faces to the right will open a sub-menu, where you can then click on one of the items in the sub-menu to open the working screen**.**

- Clicking the downward-facing triangle will collapse an open sub-menu**:**

Compressed Left Navigation Icon View:

When screen space is at a premium, you can click on the **left-facing triangle** at the top of the navigation panel to compress the navigation panel to icon mode.
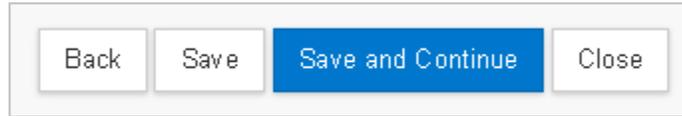
To expand the navigation panel, simply click the right-facing triangle at the top of the icon panel

When the panel is compressed, clicking on an icon will display a pop-up menu of the available options
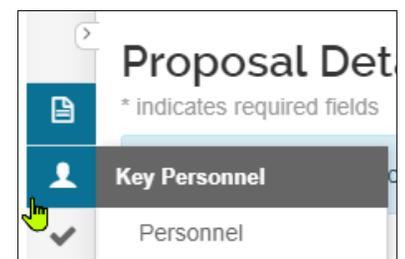
Proposal Action buttons at bottom of the page:

| Back | Save | Save and Continue | Close |

Item	Description
Back	Click to navigate to the previous listing on the left navigation bar.
Save	Click to save any entered data and to stay on the same screen.
Save and Continue	Click the **Save and Continue** button to navigate to the next section of the Proposal/Budget as listed in the **Navigation** panel.
Close	Click to close and exit the proposal.

Icons

Icon	Description
📅	Calendar icon allows you to select a date from a calendar tool and populates the field.
▪	Direct Inquiry icon displays additional details about the information appearing in the field/screen. For example, clicking the icon next to the Sponsor Name/Sponsor Code will display the Sponsor's record.
🔍	Lookup icon to search the reference table information to select from it and populate the field.
select ▾ ☐ ◉	Selection tools; Use the drop-down menus, checkboxes, and/or radio buttons to select options to specify information in the field.
✎	Expands the field and opens it as a pop-up window.
ⓘ	Information icon appearing next to questions in a Proposal. It displays more information about the specific questions.
Proposal Type: *	Fields marked with **asterisk** are **required fields for saving** the Proposal Development document.
🗑	Delete icon.

Keyboard Navigation:

Users with *Edit* access may also navigate in the Proposal using the Keyboard keys:

Keyboard Key	Description
Tab	Click the **Tab** button to navigate from one field to the next in the Proposal screen. The default tabbing sequence is left-to-right (across the first row, on to the second row, and so on). All editable fields for a given section are navigated to first, then all buttons.
↑ ↓	Click the **Down** or **Up** arrows while in the drop-down field to view the selection(s) available.
R	Click a **letter key** while in a drop-down field to view available selection(s) that begin with that specific letter.
Enter	Click the **Enter** button to either make a selection in a field or when an action button is select to perform that action.