Navigation in Kuali Research

Kuali Research Help:
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Navigation in Kuali Research

Once you have logged in to Kuali Research, you will see the Kuali Welcome screen. You can have multiple instances of Kuali Research open at the same.

To navigate from the welcome screen, you can click on a Role located across the top, type in text in the Search Tasks field, or click on an item under the Quick Links.

Roles

When you click on a Role, Kuali will show you a menu of actions for that role.
Click on the + to add a new item or the 🔍 to lookup an item.
Search Tasks

When you type in the Search Tasks field, Kuali will list the modules that fit your text. When you click on the text, Kuali will go directly to that module.

Quick Links

When you click on a Quick Link, Kuali will take you directly to that module.
Module Lookup Screen

Each module lookup screen contains various criteria to search on. See 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 Welcome screen

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. Shift and select the Action to open the item in a new window. For example, shift/open - opens in new window.

One item retrieved.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Requisitioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>open</td>
<td>Jason Michael Strahan</td>
</tr>
<tr>
<td>medusa</td>
<td></td>
</tr>
</tbody>
</table>

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

Module Detail Screen

Tabs (Awards, Subawards, Institute Proposal)

Click on a tab to see the detail for that tab.
Expand All/Collapse All

Within each tab, there may be 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

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

| 000002 | National Institutes of Health | NIH |
Open New Tab

To keep your current window on the screen it is on, right click on the Unit role in the top menu bar to open a new tab or window 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 detail information for this item is available. Click on 📖 to view the detail. 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.
Lookup Screen Search Techniques

The individual items on the Lookup screen are ‘ANDed’ together. Within an item, you can ‘OR’ various values.

Within an item that is not a dropdown selection, you can ‘or’ various values. The OR operator is the bar character (|) [shift backslash (\) on your keyboard].
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.

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

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Sponsor Code</th>
<th>Sponsor Name</th>
<th>Acronym</th>
<th>Sponsor Type</th>
<th>DUNS No</th>
</tr>
</thead>
<tbody>
<tr>
<td>return value</td>
<td>000002</td>
<td>National Institutes of Health</td>
<td>NIH</td>
<td>Federal</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>000003</td>
<td>National Institute on Aging</td>
<td>NIA</td>
<td>Federal</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>000004</td>
<td>National Institute of Allergy and Infectious Diseases</td>
<td>NIAID</td>
<td>Federal</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>000005</td>
<td>National Institute of Arthritis &amp; Musculoskeletal &amp; Skin Diseases</td>
<td>NIAMS</td>
<td>Federal</td>
<td></td>
</tr>
<tr>
<td>return value</td>
<td>000007</td>
<td>National Institute of Child Health and Human Development</td>
<td>NICHD</td>
<td>Federal</td>
<td></td>
</tr>
</tbody>
</table>
Click on return value to return that selection to the original Lookup screen.

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 detail about that value through a pop-up.

<table>
<thead>
<tr>
<th>Sponsor Code:</th>
<th>000500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acronym:</td>
<td>NSF</td>
</tr>
<tr>
<td>Audit Report Sent For Fy:</td>
<td></td>
</tr>
<tr>
<td>CAGE Number:</td>
<td>4400</td>
</tr>
<tr>
<td>Country Code:</td>
<td>United States</td>
</tr>
<tr>
<td>DODAC Number:</td>
<td></td>
</tr>
<tr>
<td>DUN And Bradstreet Number:</td>
<td>074811803</td>
</tr>
<tr>
<td>DUNS Plus Four Number:</td>
<td></td>
</tr>
<tr>
<td>Owned By Unit:</td>
<td>University of Maryland</td>
</tr>
<tr>
<td>Postal Code:</td>
<td>22230</td>
</tr>
<tr>
<td>Address Book Id:</td>
<td>11745</td>
</tr>
<tr>
<td>Sponsor Name:</td>
<td>NSF</td>
</tr>
<tr>
<td>Sponsor Type:</td>
<td>Federal</td>
</tr>
<tr>
<td>State:</td>
<td>VIRGINIA</td>
</tr>
</tbody>
</table>
**Wildcard Search**

You can do a wildcard search by typing an *.* This can be used at the beginning, the middle, or the end of any string in the search field. The * replaces one or more characters. You can also use more than one * in a field search.

```
Subrecipient Name: *yale*
```

The ? is similar to the * in a wildcard search except that it replaces only one character.

```
Proposal Number: ?774?
```

**Or Search**

In a given field, you can do an OR search by typing the value, doing a shift\ (results in |) and then the next value.

```
Subaward ID: 2241|2242
```

**Number Search**

You can use the <, >, >=, <= on fields that contain only numbers (dates, account ID, Unit ID, etc.)