

Overview:

This Quick Reference Card will demonstrate how to navigate the PI Dashboard found in Kuali Coeus.

The PI Dashboard displays Expenditures Volume, Alerts, and Research Activity. This gives users access to view Proposals, Awards, Project Documents, and Key Person Maintenance documents in a single easy to use screen. Additionally, it assists in understanding what documents could need follow-up or additional actions from the researcher.

Notes:

Clicking on proposal numbers or text in the actions column will open the document and display more information.

As a reminder, upcoming expirations and reporting requirements are displayed in the **Alerts** section.

Procedure:

1. Log into Kuali Coeus.
2. The **Dashboard** screen will automatically open after log in. This displays **Expenditures Volume**, **Alerts**, and **Research Activity**.

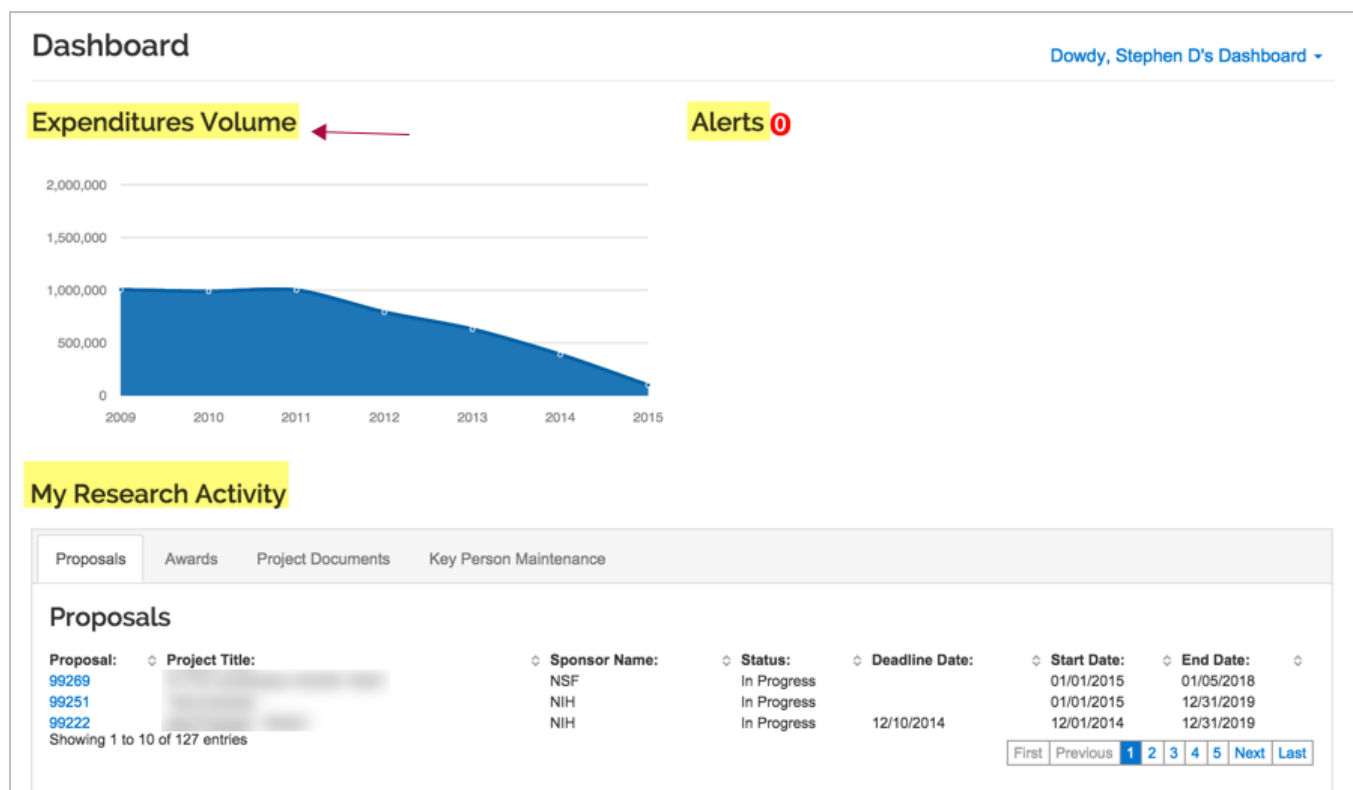


Figure 1 - PI Dashboard

3. The **Expenditures Volume** graph shows seven years of sponsored programs expenditures, including research volume as well as other sponsored activity. The volume is divided into three categories: **Direct Costs**, **Subaward Expenditures**, and **F & A**. Data in the chart is updated nightly.

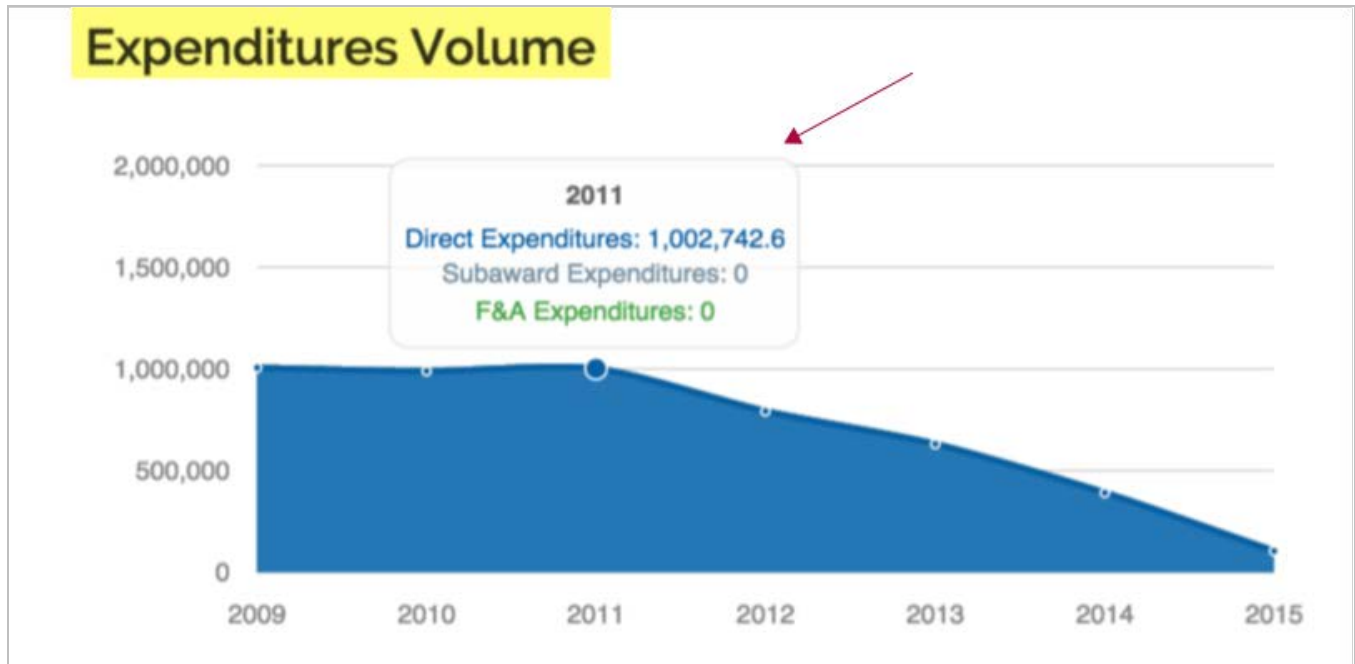



Figure 2 - Expenditures Volume

 **Note:** Hovering over a dot on the graph will display additional details like the 2011 call-out in the example above.

4. The **Alerts** section will display pending expirations and reporting requirements as a reminder that upcoming actions are required.
5. The **Proposal** tab of the PI Dashboard will be displayed by default in the **My Research Activity** section. This tab will include proposals in which the dashboard owner is either the **Principal investigator (PI)** or **PI-Contact** on a proposal. From this tab you can view the **Proposal Number**, **Project Title**, **Sponsor Name**, **Status**, **Deadline Date**, **Start Date**, and **End Date**.

Proposal:	Project Title:	Sponsor Name:	Status:	Deadline Date:	Start Date:	End Date:
99269		NSF	In Progress		01/01/2015	01/05/2018
99251		NIH	In Progress		01/01/2015	12/31/2019
99222		NIH	In Progress	12/10/2014	12/01/2014	12/31/2019

Showing 1 to 10 of 127 entries

First Previous 1 2 3 4 5 Next Last

Figure 3 – PI Dashboard

Note: This table will not display proposals where the **Researcher** is **Co-I**, **Key Person**, or another role on the proposal.

- Proposals in the **My Research Activity** section are prioritized by the **Action Required**. Proposals that are currently in **pending** status will be displayed first since they typically involve need PI action, like certification, and other PI involvement. Then, Proposals with **Revision Requested** are displayed next to inform you that additional information and revisions are needed before proposal approval. Lastly, all other proposals where the dashboard owner is either the **Principal investigator (PI)** or **PI-Contact** on a proposal.

Proposal:	Project Title:	Sponsor Name:	Status:	Deadline Date:	Start Date:	End Date:
99269		NSF	In Progress		01/01/2015	01/05/2018
99251		NIH	In Progress		01/01/2015	12/31/2019
99222		NIH	In Progress	12/10/2014	12/01/2014	12/31/2019

Showing 1 to 10 of 127 entries

First Previous 1 2 3 4 5 Next Last

Figure 4 - Proposal Prioritization

Notice in the example above **In Progress** proposals are listed first since they have not been submitted for approvals and require more information before sent for approval.

- Clicking on the **Proposal Number** (such as number 99269 in the figure above) will take you to the **KC Proposal Document**.

Figure 5 - Proposal Document


- Return to the PI Dashboard by selecting the **Dashboard** button on the Kuali Coeus header

Figure 6 - Returning to PI Dashboard

- The Awards tab displays the **Award Number**, **Award Title**, **Sponsor Name**, **Status**, **Deadline Date** and **Start/End Dates**. Like the **Proposals** section, the table will only show proposals where the **Dashboard Owner** is either **PI** or **PI-Contact** and are prioritized.

Award:	Award Title:	Sponsor Name:	Status:	Account Number:	Start Date:	End Date:
010163-00160		Maine Medical Center Research Institute	Hold		03/26/2007	03/25/2008
010163-00139		University of California-San Diego	Active		12/01/2005	11/30/2011
010163-00142		University of Medicine and Dentistry of NJ	Active		02/01/2006	01/31/2012

Figure 7 – Awards Tab

 **Note:** Clicking on any of the arrows in a column header allows you to sort the information in the column by either ascending or descending order.

10. Awards that are in **Hold** status are displayed first, with **Pending**, **Active**, and **Closed** each prioritized to assist the researcher in finding awards that require action or attention.

Notice in figure 7, the first award is in **Hold** status and could require additional action.

11. Clicking on the **Award Number** link will take you to the **Award** document in KC.

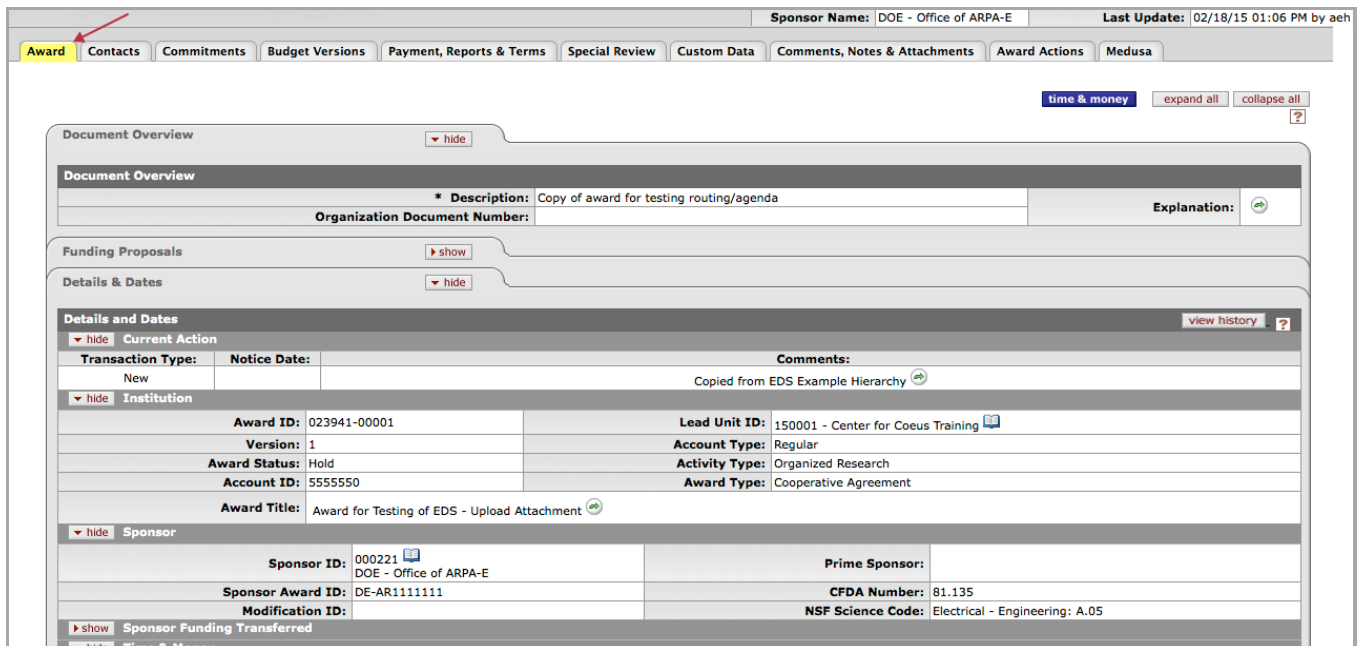


Figure 8 – Award Document

12. Return to the PI Dashboard by selecting the **Dashboard** button on the Kuali Coeus header



Figure 9 - Returning to PI Dashboard

13. Click the **Project Documents** tab to view your project documents.

The **Project Document** tab displays the **Actions**, **Award Title**, **Sponsors Name**, **Status**, **Account Number**, and **Start/End Dates**. Like the other sections, the results displayed only reflect documents where you are the **PI** or **PI-Contact** on the award. Additionally, only parent account information is displayed.

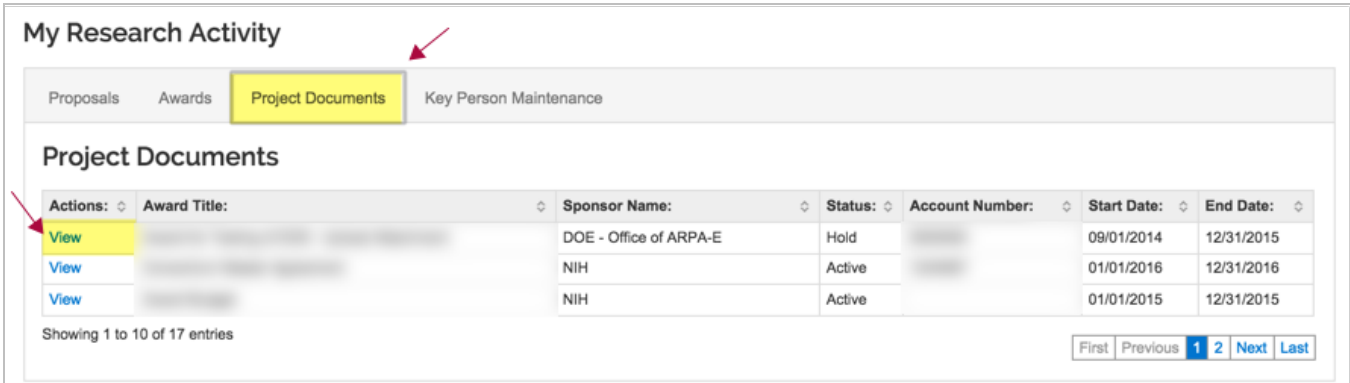


Figure 10 – Project Documents Tab

14. Clicking on the **View** link takes you to the project documents for this Award.

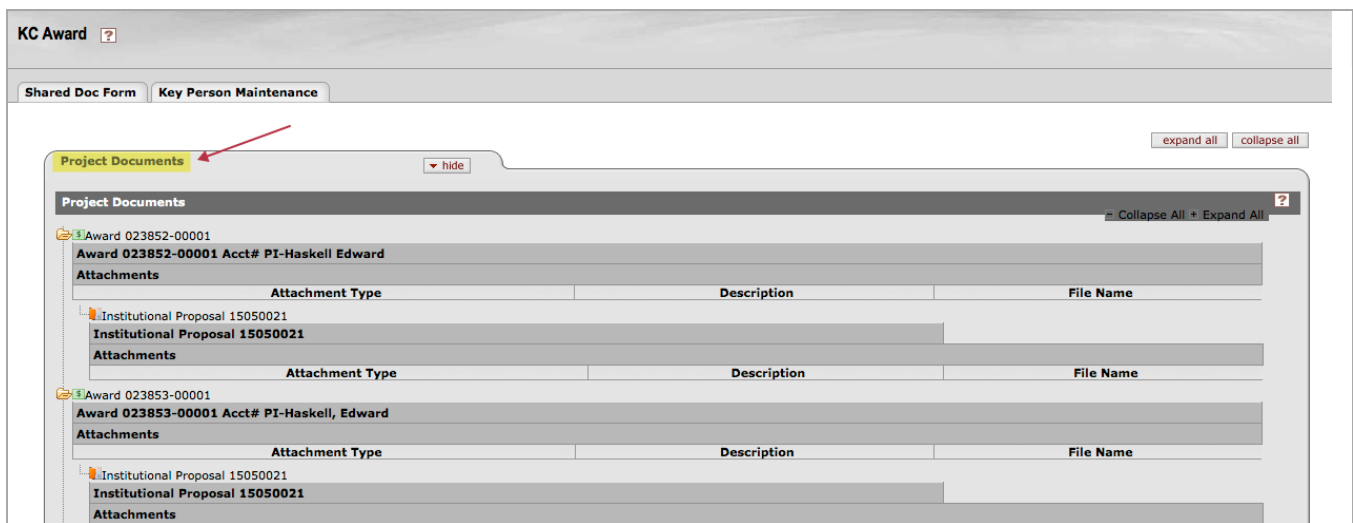


Figure 11 - Project Documents

15. Return to the PI Dashboard by selecting the **Dashboard** button on the Kualu Coeus header



Figure 12 - Returning to PI Dashboard

16. Click on the **Key Person Maintenance** tab. The **Key Person Maintenance** tab display the **Actions**, **Award Title**, **Sponsors Name**, and **Investigator**. Like the other sections, the results displayed only reflect key person information where you are the **PI** or **PI-Contact** on the award. Additionally, only parent account information is displayed.

My Research Activity

Proposals Awards Project Documents **Key Person Maintenance**

Key Person Maintenance

Actions:	Award Title:	Sponsor Name:	Status:	Account Number:	Start Date:	End Date:
View		DOE - Office of ARPA-E	Restricted - No Postings Allowed		09/01/2010	12/31/2013
View		DOE - Office of ARPA-E	Hold		09/01/2014	12/31/2015
View		NIH	Active		01/01/2016	12/31/2016

Showing 1 to 10 of 17 entries

First Previous **1** 2 Next Last

Figure 13 – Key Person Maintenance

Note: Click on the **show** drop-down list to change the amount of entries shown on a single page.

17. Clicking on the **View Key Person** link takes you to the **KC Award Key person Maintenance** document.

KC Award

Shared Doc Form **Key Person Maintenance**

* Unsaved changes will be lost.

Project Documents

Key Personnel

	*Person	Unit	*Project Role	Email	Confirm Timestamp	Actions
Add	Employee User Name: <input type="text"/>		Key Person * Project Role: (Required for Key Persons)			<input type="button" value="add"/> <input type="button" value="reset"/>
	Non-employee ID: <input type="text"/>					
3	Cleaver, Theodore	Center for KC Training	Key Person Project Role: Postdoctoral Associate	thebeave@mit.edu		<input type="button" value="Confirm"/> <input type="button" value="delete"/>
	<input type="button" value="show"/> Person Details					
	<input type="button" value="show"/> Unit Details					
4	Mondello, Larry	Center for KC Training	Key Person Project Role: Project Manager	larrym@mit.edu		<input type="button" value="Confirm"/> <input type="button" value="delete"/>
	<input type="button" value="show"/> Person Details					
	<input type="button" value="show"/> Unit Details					
	<input type="button" value="show"/> Key Person Removal History					

Figure 14 - Key Person Maintenance Document

Getting Help

For questions or problems using Quali Coeus PI Dashboard Quick Reference Card, email the Support Team at kc-help@mit.edu Include your **Name**, **Contact Information**, and **Comments/Concerns**.