

Overview:

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**.

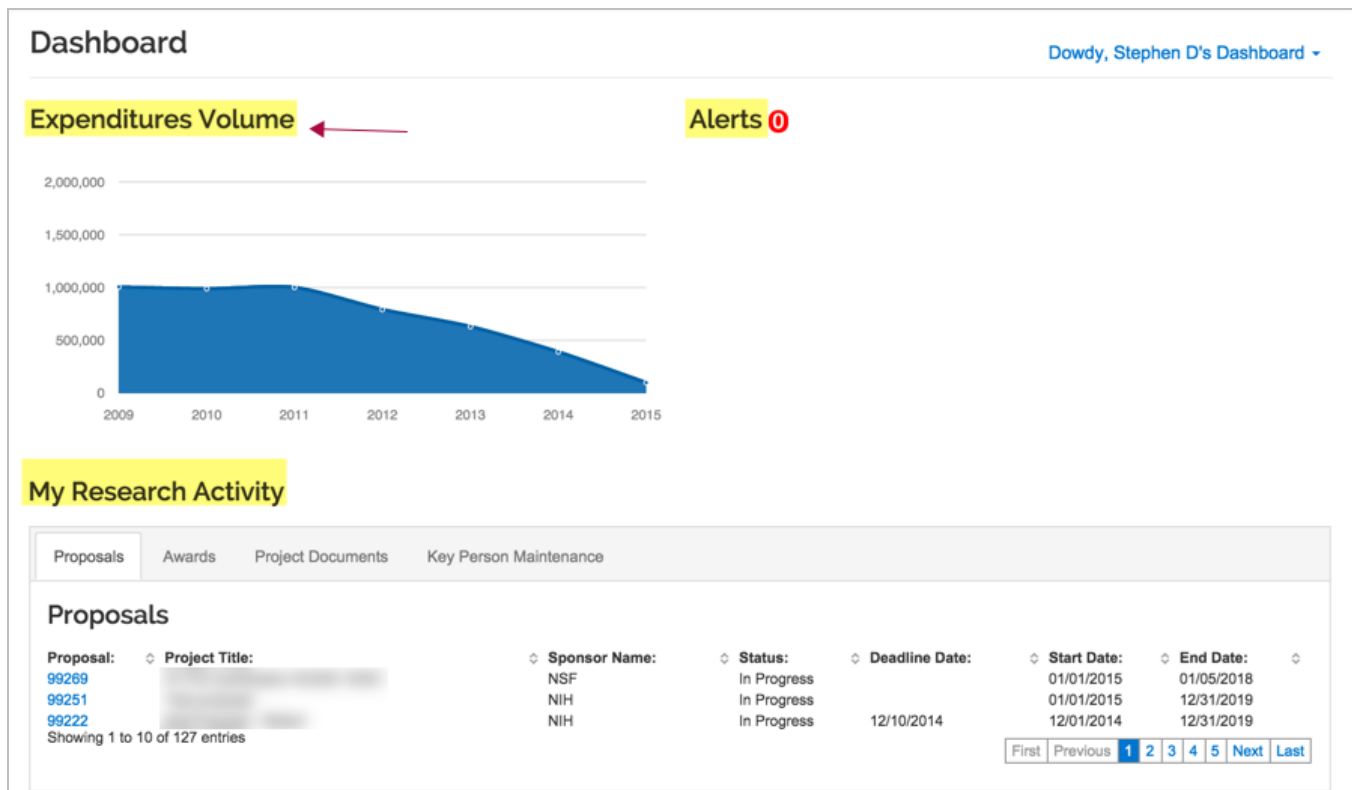


Figure 1 - PI Dashboard

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.

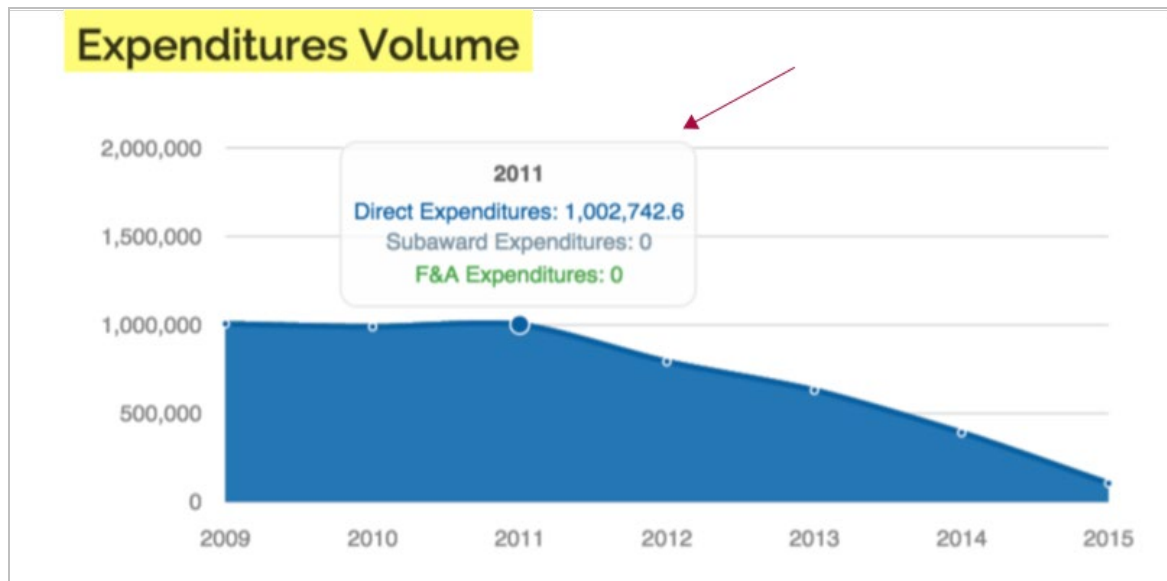


Figure 2 - Expenditures Volume

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

- The **Alerts** section will display pending expirations and reporting requirements as a reminder that upcoming actions are required.
- 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**.

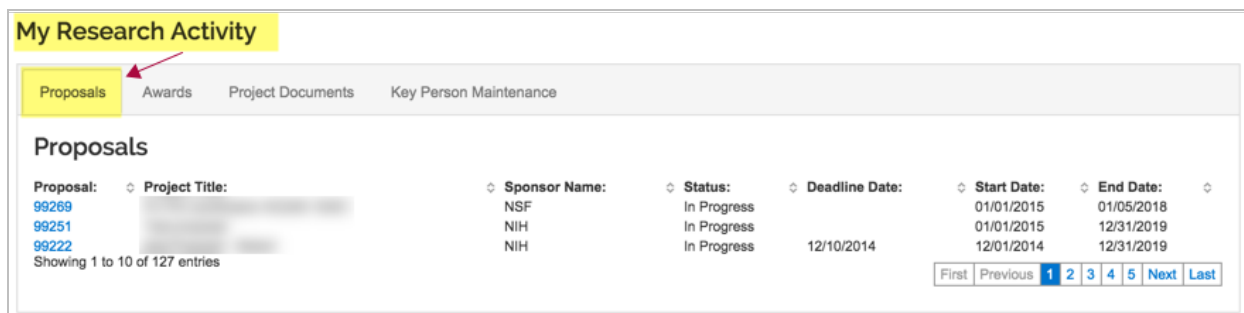


Figure 3 – PI Dashboard > Proposals

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.

My Research Activity

Proposals Awards Project Documents Key Person Maintenance

Proposals

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**.

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kc6021-s18-20150428-1258 User: dgarcia6 Doc Search Action List Get Help

Proposal Development

Proposal: #397238 ←

PI: Haskell, Edward

Document Info
 Doc Nbr: 1113252
 S2S Connected: **yes**
 Initiator: kmann
 Status: In Progress
 more...

Data Validation (off) Print Copy Medusa Hierarchy Budget Versions Help

Proposal Details

* indicates required fields

Proposal Type: * New

Lead Unit: 154000

Activity Type: * Organized Research

Project Dates: * 07/01/2016 to 06/30/2019

Project Title: * Kim test for KC PreAward testing day Jan 15th S2S changing title

Sponsor: * 000340 NIH

Save Save and Continue Close

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.

My Research Activity

Proposals **Awards** Project Documents Key Person Maintenance

Awards

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

Showing 1 to 10 of 141 entries

First Previous **1** 2 3 4 5 Next Last

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.

- 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.

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

Sponsor Name: DOE - Office of ARPA-E Last Update: 02/18/15 01:06 PM by aeh

Award Contacts Commitments Budget Versions Payment, Reports & Terms Special Review Custom Data Comments, Notes & Attachments Award Actions Medusa

time & money expand all collapse all

Document Overview

Document Overview

* Description: Copy of award for testing routing/agenda Explanation: [?]

Organization Document Number:

Funding Proposals

show

Details & Dates

hide

Details and Dates

hide Current Action view history [?]

Transaction Type:	Notice Date:	Comments:	
New		Copied from EDS Example Hierarchy [?]	
hide Institution	Award ID: 023941-00001	Lead Unit ID: 150001 - Center for Coeus Training [?]	
	Version: 1	Account Type: Regular	
	Award Status: Hold	Activity Type: Organized Research	
	Account ID: 5555550	Award Type: Cooperative Agreement	
	Award Title: Award for Testing of EDS - Upload Attachment [?]		
hide Sponsor	Sponsor ID: 000221 [?]	Prime Sponsor:	
	DOE - Office of ARPA-E	CFDA Number: 81.135	
	Sponsor Award ID: DE-AR1111111	NSF Science Code: Electrical - Engineering: A.05	
	Modification ID:		
show Sponsor Funding Transferred			
hide Time & Money			

Figure 7 - Award Document

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

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HOME **DASHBOARD** SYSTEM ADMIN PORTAL

kc6021-s18-20150428-1258 User: skluth [?] Doc Search Action List Get Help

Figure 8 - 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.

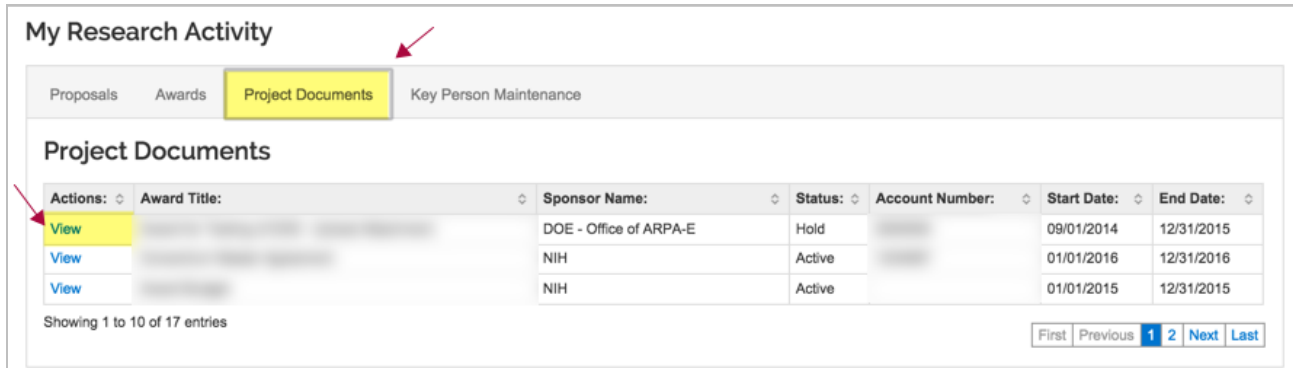


Figure 9 – Project Documents Tab

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

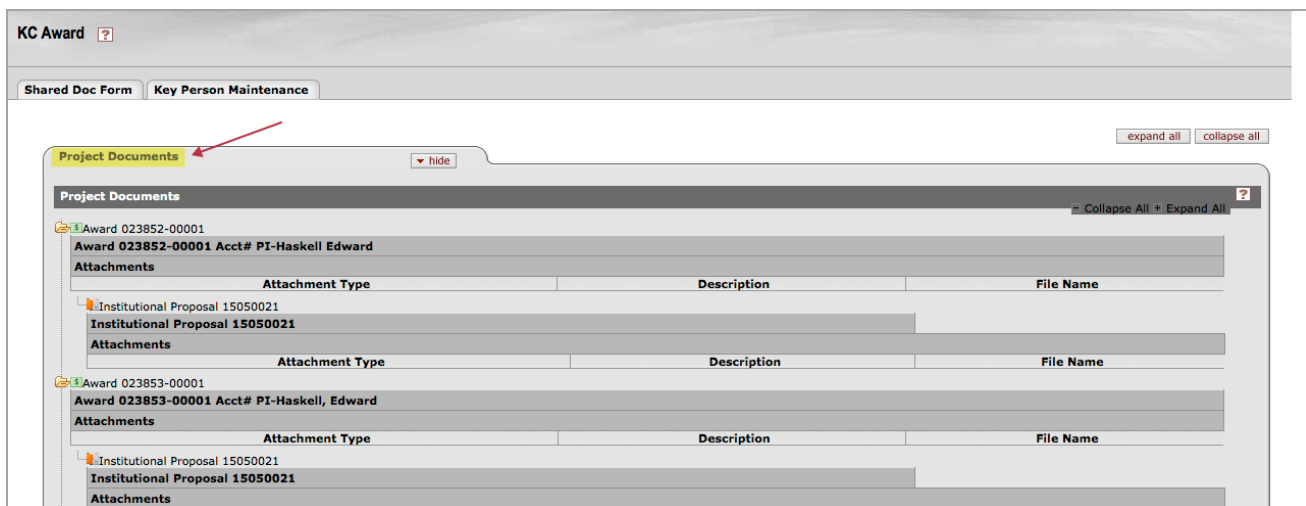


Figure 10 - Project Documents

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



Figure 11 - Returning to PI Dashboard

Getting Help

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