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.

Procedure:

1. Log into Kuali Coeus.

2. The Dashboard screen will automatically open after log in. This displays Expenditures Volume, Alerts, and Research Activity.

3. The Expenditures Volume graph shows seven years of sponsored programs expenditures, including research volume as well as other sponsored activity. The volume

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.
is divided into three categories: Direct Costs, Subaward Expenditures, and F & A. Data in the chart is updated nightly.

![Expenditures Volume](image)

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**.

![My Research Activity](image)

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.

6. 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.
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.

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

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

9. 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.
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.

12. Return to the PI Dashboard by selecting the Dashboard button on the Kuali Coeus header
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](image)

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

![Figure 10 - Project Documents](image)

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

![Figure 11 - Returning to PI Dashboard](image)

### Getting Help

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