Overview:

Your Kuali Coeus (KC) **Action List** functions like a mailbox and serves as a central location where you can access a listing of all items that require your attention; i.e. proposals in need of an approval, notifications about proposals, certification requests, etc.

For items that require your attention, you will be notified by email to your MIT email account. The email will come from: kc-notifications@mit.edu. **For each approval or notification email you receive you will also receive a message in your KC Action List**.

The information is displayed in a table format and provides a quick view of the type of document, its title, status, the type of action that is being requested of you, who initiated the document, and a way to view its route information. It also indicates whether you've received a request because you are delegate or a member of a group.

This Quick Reference Card will demonstrate how to maintain your KC **Action List**. Additionally, this topic will cover how to use the **Action List** and **Outbox** tabs and how to set preferences, filters and delete resolved items on which you have taken action.

Procedure:

Accessing & Using Your Action List

1. While in the Kuali Coeus **Home** screen, click the **Action List** link located in the top toolbar.

Figure 1 – Action List Link

Your KC **Action List** will open displaying the items needing you to review or take action on.

Figure 2 – Action List

The KC **Action List** has two tabs:
- **Action List** – displays the items needing action, such as Proposal awaiting your approval, certification requests, etc.
- **Outbox** – displays those items on which you have already taken action.

Note: The **Action List** will open with **Action List** tab as the default display.

There are three types of entries that may appear in your Action List:

- **Notification** entries have a Type of KC Notification and an Action Request of FYI. The Title of the Notification will provide a brief summary of what the Notification is about (e.g. Regarding your involvement in …, Proposal is submitted, All Proposal Persons Certification Completed) and in the Id Column the Document Number will display. Notifications remain in your **Action List** tab until you take Action on it in the **Actions** column drop-down and clicking the **take actions** button.

- **Approval** requests will have an Action Request of Approve. The Title of the Approval request will include the beginnings of the **Proposal Title, Proposal Number, PI's Name, Sponsor Name, and the Due Date to the Sponsor**. Approval requests will move automatically from the **Action List** tab to the **Outbox** tab when you approve or return for corrections the proposal.

- **Complete** entries will have a subject similar to the Approval Requests. These entries appear for items which you started but not finalized yet in the system. For example, you started a proposal but it has not been submitted to review yet. These entries will be removed from the **Action List** tab when the record is finalized (e.g. submitted for review).

2. To sort your **Action List** click on the header of the column you wish to sort by. For example, you can sort by **Deadline Created.**

	Id	Type	Title	Route Status	Action Requested	Delegator	Date Created	Group Request	Actions	Log
▶ show	1111849	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:44 PM 01/19/2015		NONE ▼	
▶ show	1111851	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:45 PM 01/19/2015		NONE ▼	
▶ show	1111850	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:45 PM 01/19/2015		NONE ▼	

Figure 3 – Sorting

3. You can click the **show** button available next to Notifications and Approval requests, to display additional information about the request (e.g. certification requests, proposal summary information, etc.).

Figure 4 – Notification Details

Figure 5 – Approval Request Details

Note: Clicking on the **Id number link** for notifications will display the details in a separate browser window. Clicking on the **Id number link** for approval requests will open the proposal and automatically bring you to the **Summary/Submit** screen.

4. To take an action on a Notification from the **Action List** (and to move it to the **Outbox**), in the **Actions** column for the item, select the appropriate action from the drop-down (e.g. FYI) and then click the **take actions** button at the bottom of the screen.

|	Id	Type	Title	Route Status	Action Requested	Delegator	Date Created	Group Request	Actions	Log
▸ show	1111849	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:44 PM 01/19/2015		NONE ▾ NONE FYI	🔍
▸ show	1111851	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:45 PM 01/19/2015			🔍
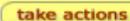
take actions

Figure 6 – Taking Action

Note: If you have multiple Notifications that you want to take an action on all at once, you can select the Action from the drop-down located at the top of the screen and then click the **apply default** button. The available actions for each item displayed will change to the action selected. The click the **take actions** button at the bottom of the screen.

FYI ▾ apply default

Action List | Outbox

258 items retrieved, displaying 1 to 10.[First/Prev] **1**, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

	Id	Type	Title	Route Status	Action Requested	Delegator	Date Created	Group Request	Actions	Log
▸ show	1111849	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:44 PM 01/19/2015		FYI ▾	🔍
▸ show	1111851	KC Notification	Regarding your involvement in Development Proposal Theobromine and its effect of Dopamine production	FINAL	FYI		05:45 PM 01/19/2015		FYI ▾	🔍

Figure 7 – Taking Action on Multiple Items at Once

5. As you take action on an item (such as approving a proposal) in your **Action List**, it will move to the **Outbox** tab automatically. Click the **Outbox** tab to view those items.

Action List | **Outbox**

delete selected items

44 items retrieved, displaying 1 to 10.[First/Prev] **1**, 2, 3, 4, 5 [Next/Last]

Id	Type	Title	Route Status	Action Requested	Delegator	Date Created	Group Request	Delete Item	Log
1112121	Proposal Development Document	Important Research ; Proposal No: 24853; PI: Haskell, Edward; Sponsor: Software 2000; Due Date: null	FINAL	APPROVE		10:23 AM 03/05/2015		☐	🔍
1112390	Proposal Development Document	Theobromine and its; Proposal No: 24883; PI: Haskell, Edward; Sponsor: NIH; Due Date: 06/05/2015	FINAL	APPROVE		07:56 PM 03/17/2015		☐	🔍

Figure 8 - Outbox

📌**Note:** The list items in your **Outbox** will continue to increase as you take action on items.

6. You can remove items in the **Outbox** by selecting the **Delete Item** checkbox for each item you want to delete and then clicking the **delete selected items** button.

Figure 9 – Deleting Items in the Outbox

📌**Note:** You cannot delete items from the **Action List** tab that still require an action.

7. To update your KC **Action List** with the most current items that require your attention, click the **refresh** button located at the top of the Action List screen.

Figure 10 – Refresh Button

Setting Your Action List Preferences

The **Action List Preferences** (Workflow Preferences) section allows you to customize the appearance and functionality of your **Action List**. This includes the ability to adjust automatic refresh rate, page size, email notifications, and delegate filters; to specify which fields are displayed; and to specify the colors associated with documents in each route status.

The **Workflow Preferences** screen has four sections that group related preference options: General, Fields Displayed In Action List, Document Route Status Colors for Action List Entries, and Email Notification Preferences.

General
The **General** section allows you to:
• Choose how frequently the page refreshes.
• Select how many Action Requests appear per page.
• Limit the list of documents to display in the Action List by setting filters for Delegators
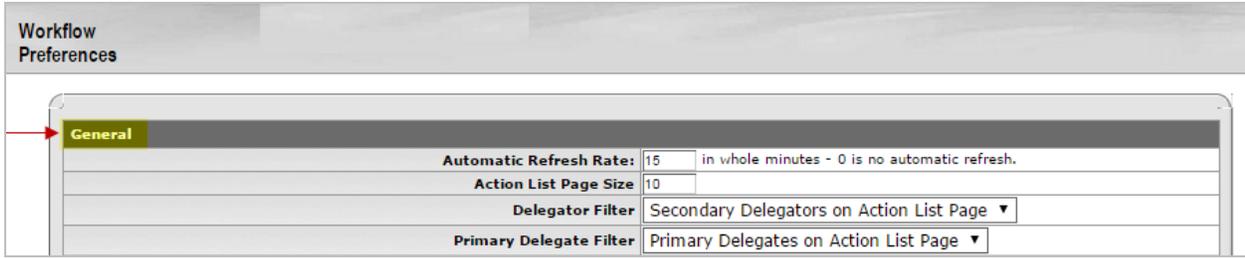
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Figure 11 – General Section

1. To modify the **General** section criteria change the information defaulted in the fields accordingly, following the guidelines provided in the table below:

Field	Description
Automatic Refresh Rate	Enter a number in whole minutes to indicate how often your **Action List** should automatically update. As stated on the screen, a setting of '0' does not allow for an automatic refresh to occur and you will need to manually refresh your **Action List** by clicking the available **refresh** button.
Action List Page Size	Enter a number of rows to display per page in the **Action List**.
Delegator Filter	Select one of the following options from the list as desired: **Secondary Delegators on Action List Page**, or **Secondary Delegators only on Filter Page**.
Primary Delegator Filter	Select one of the following options from the list as desired: **Primary Delegators on Action List Page**, or **Primary Delegators only on Filter Page**.

Fields Displayed In Action List
This section allows you to enable or disable individual columns that are displayed on the **Action List** screen.

2. As desired, select the fields you want displayed and deselect the ones you do not want displayed in your **Action List**.

Figure 12 – Fields Displayed in Action List Section

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Note: If you deselect the '**Use Outbox**' checkbox, you will not see the **Outbox** tab.

Document Route Status Colors for Action List Entries

This section allows you to apply colors to Action Requests based on the Route Status.

3. As desired, click one of the color options for each document route status. The row containing the document of the status is displayed in the color of your choice in the **Action List**.

Figure 13 – Document Route Status Colors for Action List Entrees

Note: The default color selection is white for all route statuses.

Email Notification Preferences

This section allows you to select the frequency of (or disable) e-mail notification regarding new requests.
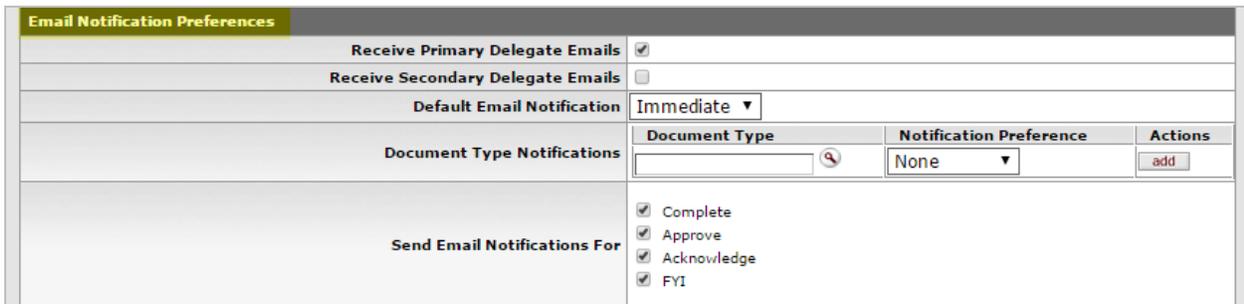

Figure 14 – Email Notification References

4. To modify the **Email Notification Preferences** section, change the information defaulted in the fields accordingly, following the guidelines provided in the table below:

Field	Description
Receive Primary Delegate Emails	When selected, you will receive notifications for those items you are listed as a primary delegate (e.g. on Proposal).
Receive Secondary	When selected, you will receive notifications for those items you are listed as a secondary delegate (e.g. on Proposal).

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Field	Description
Delegate Emails	
Default Email Notification	Select one of the following e-mail frequencies from the list as desired: **None**, **Daily**, **Weekly**, or **Immediate**.
Document Type Notification	Select the specific Document Types for which you want to receive notifications for along with the Notification Preference frequency.
Send Email Notifications for	Select the request types for which you want to receive notifications by checking the applicable checkboxes.

5. Once you finished setting your preferences, click the **save** button at the bottom of the page.

Note: Clicking the **reset** button will return the sections to the default preferences and clicking the **cancel** button will cancel changes made to the screen.

Your **Action List** should update accordingly.

Figure 15 – Updated Action List

Creating & Using Action List Filter

Setting a filter allows you to display a subset of the **Action List** based on the filter criteria entered.

1. To create an **Action List Filter**, click the **filter** button located at the top of the **Action List** screen.

Figure 16 – Filter Button

The **Action List Filter** window will display.

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Figure 17 – Action List Filter

2. Specify the filer criteria by completing the desired fields and following the information in the table below:

Field	Description
Document Title	Enter a partial or full character string that you are looking for in the document Title field in the Action List. For example, when you enter 'Test' in the **Document Title** field, the Action List displays all documents that contain 'Test' in the Title field located in the Action List. This field is case sensitive. Select the **Exclude?** checkbox to exclude items with the entered text from the list.
Document Route Status	Select a **route status** from the **Document Route Status** list. The list contains the choices: All, Approved, Disapproved, Enroute, Exception, Processed, and Saved. Select the **Exclude?** checkbox to exclude documents with the selected status from the list.
Action Requested	Select an **action** from the **Actions Requested** list. The list contains: Acknowledge, Approve, Disapprove, and FYI. Select the **Exclude?** checkbox to exclude documents with the selected action from the list.
Action Requested Group	Defaults to No Filtering as the only option.
Document Type	Select a document type from the **Document Type** lookup 🔍. Select the **Exclude?** checkbox to exclude document type selected from the list.
Date Created	Enter a date range or select dates from the calendar by clicking the **Calendar** 📅 to limit the items based on the date they were created. The acceptable format is mm/dd/yyyy.

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Field	Description
	Select the **Exclude?** checkbox to exclude items that were created during this given time range.
Date Last Assigned	Enter a date range or select dates from the calendar by clicking the **Calendar** 🗓 to limit the items based on the date that this action item was generated for you. The acceptable format is mm/dd/yyyy. Select the **Exclude?** checkbox to exclude items that entered your action list during this given time range.

3. Click the **filter** button at the bottom of the screen to apply the filter criteria and display the results.
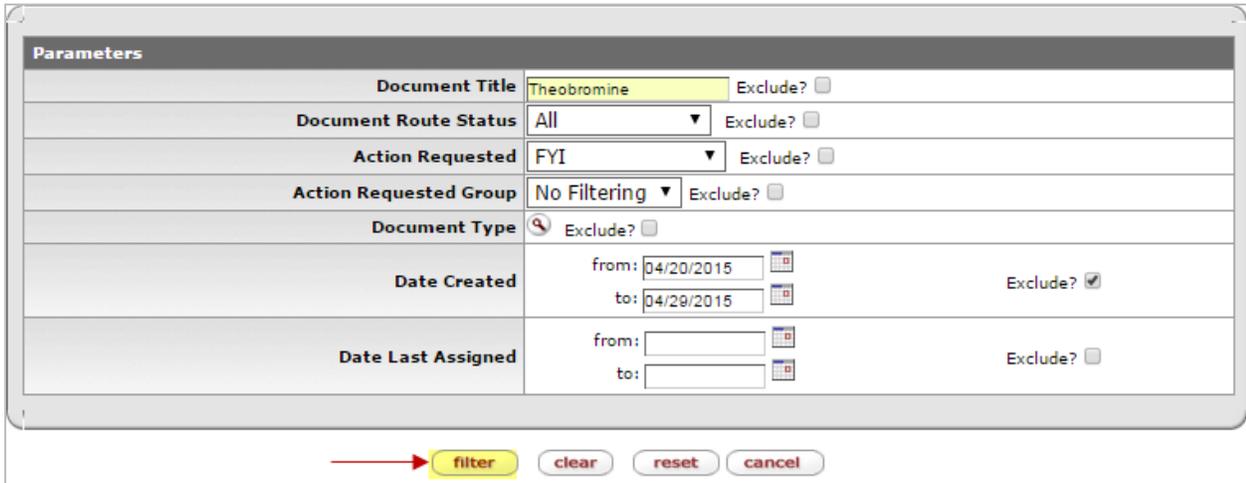

Figure 18 – Filter Button

A **System Message** will appear in the upper left corner of the Action List displaying the information on how the displayed list was filtered.
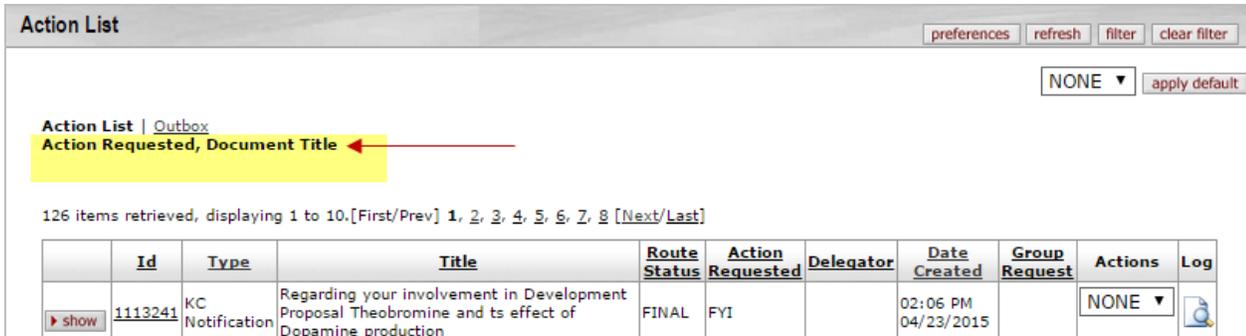

Figure 19 – Filter Message

4. To clear you filter click the **clear filter** button to remove your filter.

Figure 20 – Clear Filter Button

Note: The **clear filter** button is visible only when you have previously created the filter.

Getting Help

For questions or problems using Kuali Coeus Action List Quick Reference Card, email the Support Team at kc-help@mit.edu.

Include your **Name**, **Contact Information**, and the **questions** you have and or **difficulties** you are experiencing.

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