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 should automatically open after log in. If it doesn’t, click on “Dashboard”. The result will display 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.

![Expenditures Volume Graph](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**.
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.

![](image)

Figure 8 – Award Document

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

![](image)

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

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

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.
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.

Getting Help

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