Training Materials - Kuali - Documentation: Overview of Features and Functions

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Section: Overview of Features and Functions

What are the features of Kuali and how do I navigate basic functions?

Logging In



No proposals to display	From here, you will see your dashboard, where all of your proposals, drafts, and action items are housed.	Dashboard My Proposals ©	View All
		No proposals to display	

My Dashboard Features



Courses			
Click Courses.		🖄 My Dashboard	
Courses are organized under subject code and number.			
		 Action List 	
There are several different ways to find existing courses:		Courses	
• Title	Q Title I	Programs	
		Concentrations	
Subject code & course number	Q AMST115g	Other Forms	
	Code Title	P Opportunities	
	AMST1150 Introd	i≣₀ Agendas	
• Status (helpful if the course has been inactive for a while)	Filters:	Proposals	
	Status Status Status Retired Inactive	C Reports	
Department & College filters	Groups Department American Studies x College Anderson School of Managemen Associate Degree (Branch technic College of Stts & Sciences College of Education & Human Sciences		
Kuali will remember your previous session's filters. Reme not coming back in full.		5	

Programs	
Navigate to My Dashboard on the left-hand side of the screen.	😰 My Dashboard
Click on Programs .	Action List
	Courses
	Programs
	Concentrations
	Other Forms
	P Opportunities
	i≣o Agendas
	Proposals
	C Reports
The filters outlined in the Curriculum module above work exactly the same in the Programs form, but the easiest way to search for a program is simply to look up the program name.	Q 3-d
(i) Key Difference	Code Title
Each unique program Code, found to the left of the program Title , is assigned by the Office of the Registrar. These codes are used in Kuali only (not Banner), and general users do not need to generate these.	CERT 3D Print 3-D Printing Certificate
	CERT 3D Print TA Mini Certificate in 3D Printing





Other Forms is used when submitting Non-Curricular requests, such as:	
 Catalog policy revisions Changes to a department name Course fees, or Adoption of an existing UNM course at a Branch Campus. 	Type of Request
	 Department Name Change Course Fees Branch Course Adoption

Opportunities	
Navigate to My Dashboard on the left-hand side of the screen and click on Opportunities.	🙆 My Dashboard
	 Action List
	Courses
	Programs
	Concentrations
	(Other Forms
	• Opportunities
	i≣₀ Agendas
	Proposals
	C Reports

enhance their area of study. Opportunity Type Select one: International Experiences Scholarships and Fellowships Student Jobs Related to the Department of Program Community Engagement Contact Information Edit = Insert = Format +	Another new form, created by the Office of the Provost. This is a place where departments can share information about co-curricular opportunities available to students. The intent is to give	Opportunity Information (appears in Catalog)
	students a single location in the catalog where they can look for co-curricular opportunities to	Select one: International Experiences Scholarships and Fellowships Internships Student Jobs Related to the Department or Program Community Engagement Clubs and Student Organizations Research, Arts, or Design Experience Contact Information

General Navigation

To create a new request, click the plus sign icon () at the far right menu and fill in all subsequent fields.	+ New Course
 There are several different entry types: Free text boxes, where you can input information manually; Drop-down selections, where you can select from a prepopulated list of options; 	Course Justification Please provide a brief justification of your request. Free-form text boxes look like this.
 Type-aheads, where you can begin typing to see available selections; and File Uploads, where you can upload a file stored on your device. 	Campus Gallup Campus Health Sciences Center (Albuquerque)
Hover over the blue question-marks to view available help text regarding an entry field. Asterisks will indicate a required field.	A Anderson School of Management Associate Degree/Branch Certificate
When prompted to upload a file , make sure to use a common file type (such as .pdf or .doc) rather than device specific file types that may not be accessible to some machines (such as a Pages document).	ADD FILE

the far right is a navigation menu displaying:The summary of Changes made, and	Changes	3			
The Table of Contents . Click on any item in the table of contents to skip to	✓ Cours	e Justification	×	*	
that section of the form.	✓ Colleg	je	×		
	🗸 Depar	tment	×		
	✓ Camp	us	×	•	
	Table of	Contents			
		Information Istification		_	
	Associate				
	Course Information Course Title and Description				
	Credit Info	ormation			
	Grade Opt Elective/R	tions Required Course			
	informatio				
/hen you are satisfied with your form, select Leave Edit Mode at the top					
ht corner of the page to view a preview.	(Leave Edit Moc	le		
nom there, you may:	¢	Leave Edit Mod		oval	
ght corner of the page to view a preview.	•	Submit For		oval	
 ght corner of the page to view a preview. from there, you may: Submit for Approval to send your form into the workflow Continue Editing 	•	0		oval	
 ght corner of the page to view a preview. From there, you may: Submit for Approval to send your form into the workflow Continue Editing Delete Proposal 	•	Submit For	Appr	oval	
ght corner of the page to view a preview. From there, you may: Submit for Approval to send your form into the workflow Continue Editing		Submit For	Appr	oval	
Continue Editing Delete Proposal		Submit For Edit Delete Prop	Appr	oval	
 ght corner of the page to view a preview. From there, you may: Submit for Approval to send your form into the workflow Continue Editing Delete Proposal 		Submit For Edit Delete Prop Sharing	Appr	oval	

• Share your form with another user. Type to search then click to select a user. The user will get an email notification with a link to view the share form.	d Sharing
Add Comments. Type to search for users in the recipient(s) field. You	Select User kua kualiadmin
may tag multiple users in the comments if you'd like. Image: Comments are helpful for collaboration. Choose "grant edit access" if you'd like collaborators to be able to revise the form.	
	Select recipient(s) kualiadmin Please review the program description and provide feedback. Image: Select review Grant edit access while in this step Comment Cancel
 or Duplicate the form. Duplicate forms can be used to reduce manual entry when proposing many similar new items at once. For example, if proposing five courses for a new degree, the duplicate function allows you to use the new course form as a template for the next. Note: to avoid confusion between your duplicate and the original, give each form a unique information. Change course number, description, or other fields as appropriate. 	Course Justification Please provide a brief justification of your request. When duplicating a form, change information to make the new form unique. For example, change the course number or degree name in the fields below.
To Print a copy of your proposal, click Print to open a formatted version that can be saved as a .pdf or printed as a hard copy.	Print Audit Log

Open the Audit Log to see a summary of changes, who made changes, and the date and time of the change.					
	≡ Aud	dit Log			
	Audit Log TEST	510 - Wooden Ship Design			
	Search	Q. Action Type		Start Date	×
	Action	Field	User	↓ Date	Expand All ~
	Skip Step		Agay	08/03/2022 11:55am	View ~
	Approve		Agay	08/03/2022 11:55am	View ~
	Skip Step		Agay	08/03/2022 11:55am	View ~
	Approve		Agay	08/03/2022 11:55am	View ~
	Skip Step		Agay	08/03/2022 11:55am	View ~
	Submit For Approval		Lobo User (impersonated by Agay)	08/03/2022 11:53am	View ~
	Update	Lab/Lecture credits	Lobo User (impersonated by Agay)	08/03/2022 11:53am	View ~
	Update	Credits	Lobo User (impersonated by Agay)	08/03/2022 11:53am	Hide ^
	From: To:	Type: fixed, value: 0 Type: fixed, value: 1	Agay)		
	Update	Proposed Effective Term and Year	Lobo User (impersonated by Agay)	08/03/2022 11:53am	View ~
		Workflow processing. Retur	n to dashboard.		
The approval status at each step will update as your proposal makes its way towards full approval.	ect	Workflow processing. <u>Retur</u>			
	ect e	workflow processing. Retur	n to dashboard.		

Checking on the Status of a Proposal

#	Method	Screenshot
1	The first way to check proposals is to click M y Dashboard on the left-hand side of the screen, where your proposals will be listed.	 My Dashboard Action List Courses Programs Concentrations Other Forms Opportunities Agendas Proposals Reports Dashboard My Proposals 2 Most Recent
		Draft Draft No Title No Title Last Modified 08/01/2022 Continue Editing Continue Editing

2	Navigate to My Dashboard on the left-hand side of the screen and click on the Proposals tab. By default, the Proposals tab will show all of the proposals in the system. To narrow your results, use the Status and My Proposal filters found in the far right menu.	 My Dashboard Action List Courses Programs Oncentrations Other Forms Opportunities Agendas Proposals Reports
	You will receive an email notification when a	Status Draft Approved Under Review Denied My Proposals My Proposals n item has reached full approval.

Logging Out



Resources & Follow Up

You will receive an email notification when your form (programs, concentrations, new courses, and other proposals) reaches full approval. If you have questions regarding abouts how to use Kuali forms, please review the tutorials posted on the Registrars website or contact our staff members via email.