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

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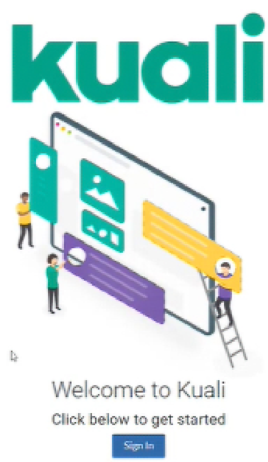
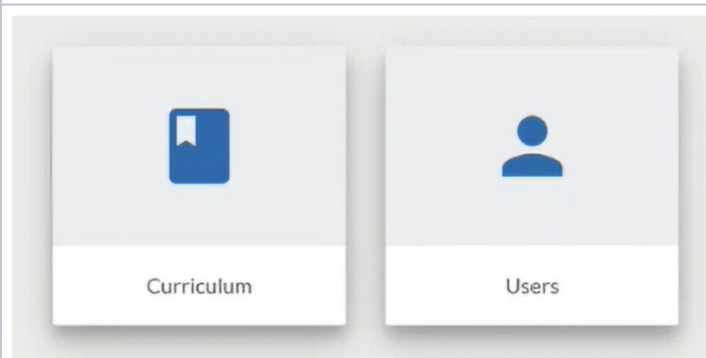
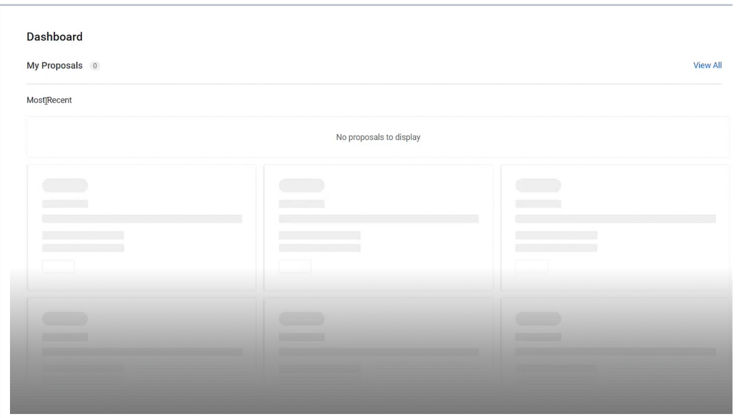
Section: Overview of Features and Functions

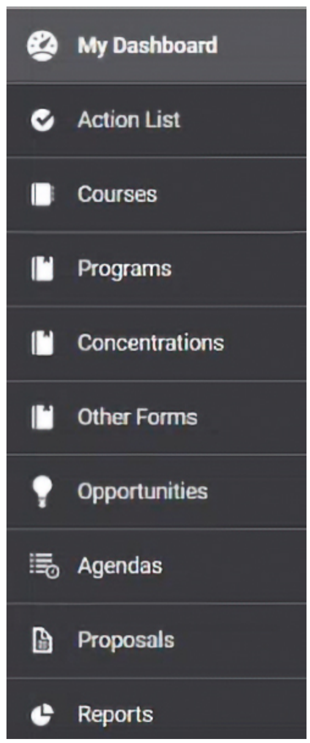
What are the features of Kuali and how do I navigate basic functions?

Logging In

Login to Kuali at unm.kuali.co with your UNM net ID and password.	
From this point, there should be two titles, **Users** and **Curriculum**. **Users** takes you to your account information. UNM is using single sign-on to manage most user settings. You may change your email notification frequency here if you wish. The **Curriculum** tile is likely where most of your work will reside. Click on this tab.	

From here, you will see your dashboard, where all of your proposals, drafts, and action items are housed.	

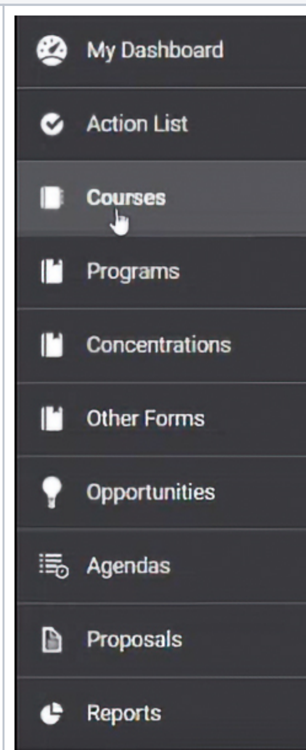
My Dashboard Features

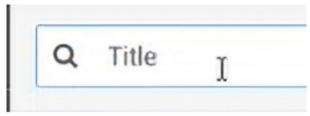
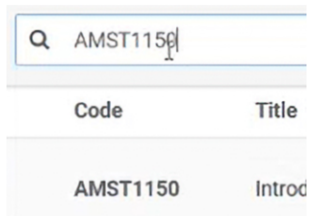
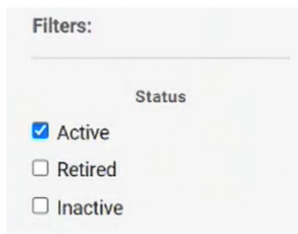
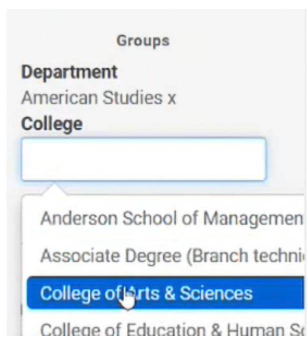
On the far left, you will find the menu titled **My Dashboard.** Kuali is divided into 5 different form sections: 1. **Courses** 2. **Programs** 3. **Concentrations** 4. **Other Forms**, and 5. **Opportunities**	

Courses

Click **Courses**.

Courses are organized under subject code and number.



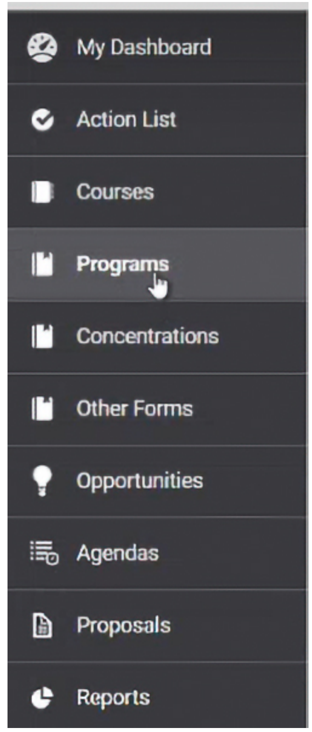
There are several different ways to find existing courses:	
• **Title**	
• **Subject code** & **course number**	
• **Status** (helpful if the course has been inactive for a while)	
• **Department** & **College** filters	

Kuali will remember your previous session's filters. Remember to reset these filters if your search is not coming back in full.

Programs

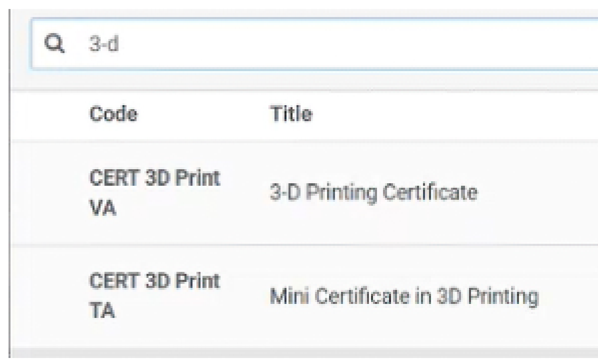
Navigate to **My Dashboard** on the left-hand side of the screen.

Click on **Programs**.



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.

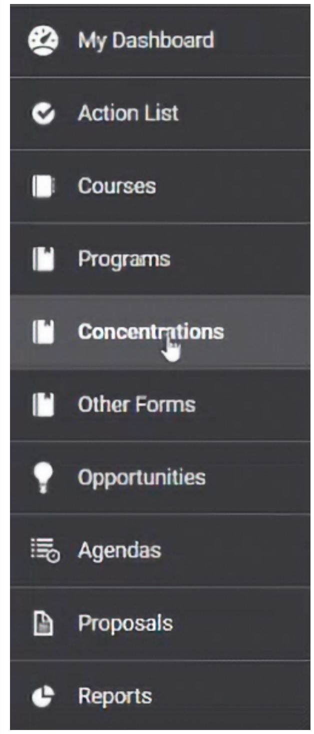
> **Key Difference**
>
> Each unique program Code, found to the left of the program **Title**, is assigned by the Office of the Registrar. These codes are used in Kuali only (not Banner), and general users do not need to generate these.



Concentrations

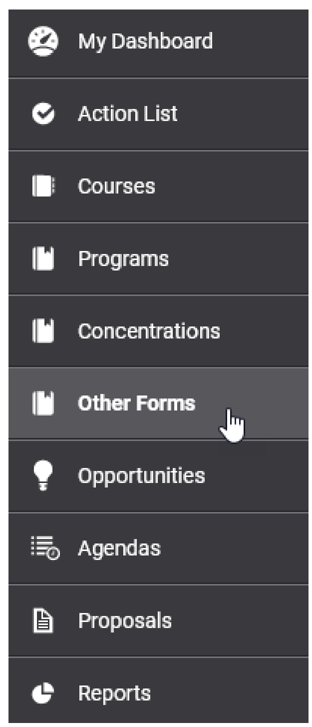
Navigate to **My Dashboard** on the left-hand side of the screen and click on **Concentrations**.

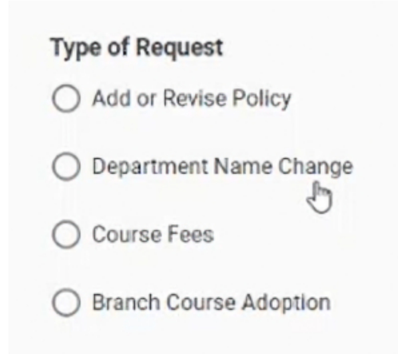
This is a brand new function. Previously, **Programs & Concentrations** were accessed in single form, and have now been divided into two. Program and concentration information is linked together in the catalog.



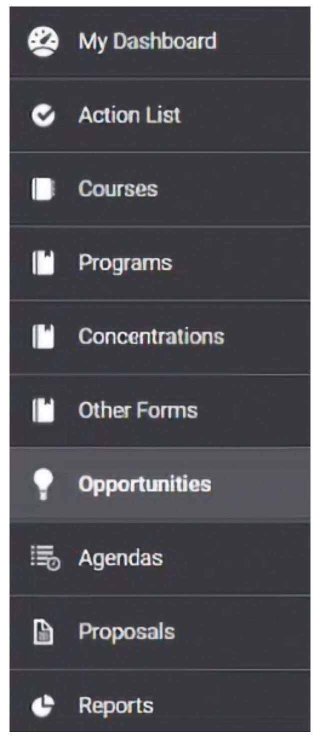
Other Forms

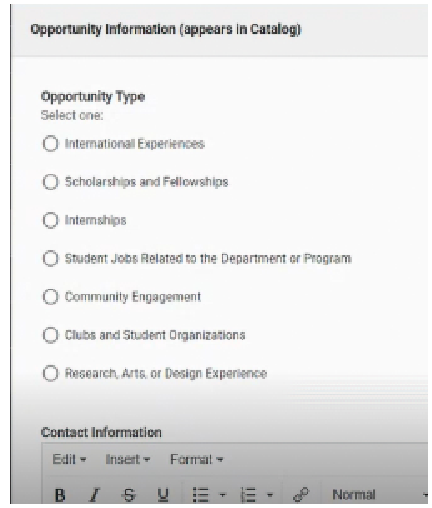
Navigate to **My Dashboard** on the left-hand side of the screen and click on **Other Forms**.



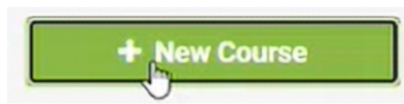
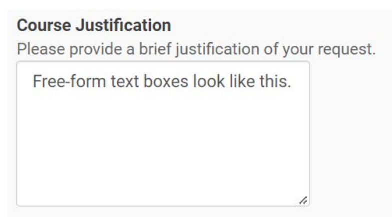
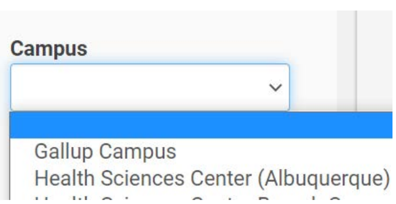
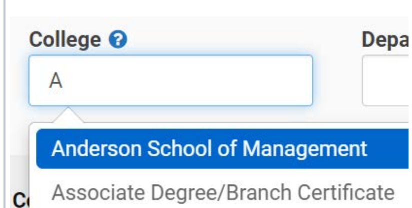
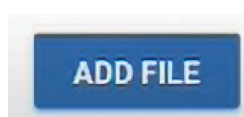
Other Forms is used when submitting Non-Curricular requests, such as: • Catalog policy revisions • Changes to a department name • Course fees, or • Adoption of an existing UNM course at a Branch Campus.	

Opportunities

Navigate to **My Dashboard** on the left-hand side of the screen and click on **Opportunities**.	

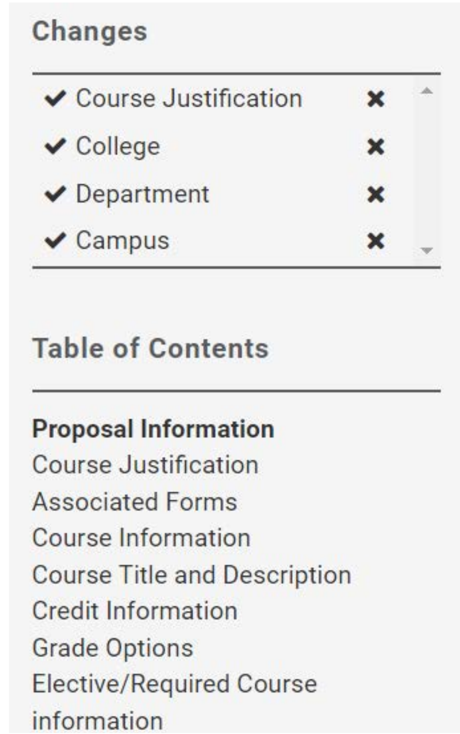
Another new form, created by the Office of the Provost. This is a place where departments can share information about co-curricular opportunities available to students. The intent is to give students a single location in the catalog where they can look for co-curricular opportunities to enhance their area of study.	

General Navigation

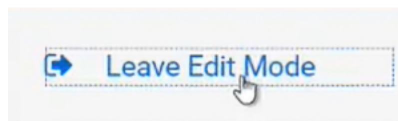
To create a new request, click the **plus** sign icon (+) at the far right menu and fill in all subsequent fields.	
There are several different entry types: • **Free text boxes**, where you can input information manually; • **Drop-down selections**, where you can select from a pre-populated list of options; • **Type-aheads**, where you can begin typing to see available selections; and • **File Uploads**, where you can upload a file stored on your device. Hover over the **blue question-marks** to view available help text regarding an entry field. **Asterisks** will indicate a required field. 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).	

To the far right is a navigation menu displaying:

- The summary of **Changes** made, and
- The **Table of Contents.** Click on any item in the table of contents to skip to that section of the form.



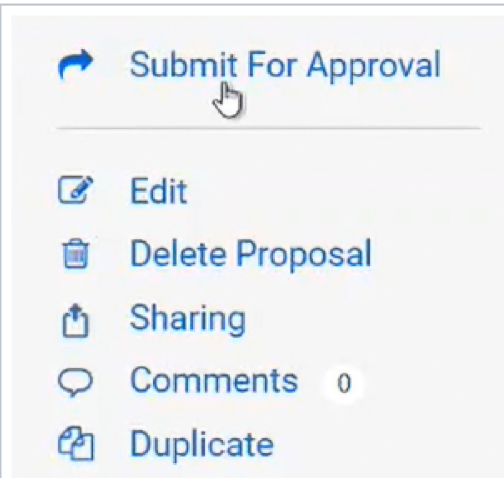
When you are satisfied with your form, select **Leave Edit Mode** at the top right corner of the page to view a preview.



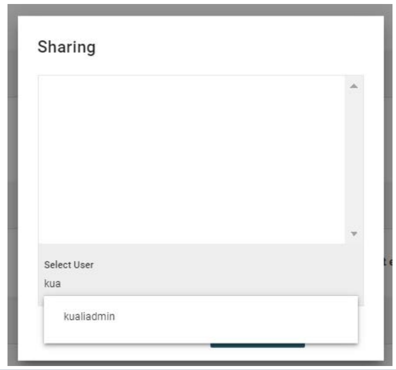
From there, you may:

- **Submit for Approval** to send your form into the workflow
- Continue **Editing**
- **Delete Proposal**

> ⚠ This action is permanent! Deleted proposals cannot be retrieved.

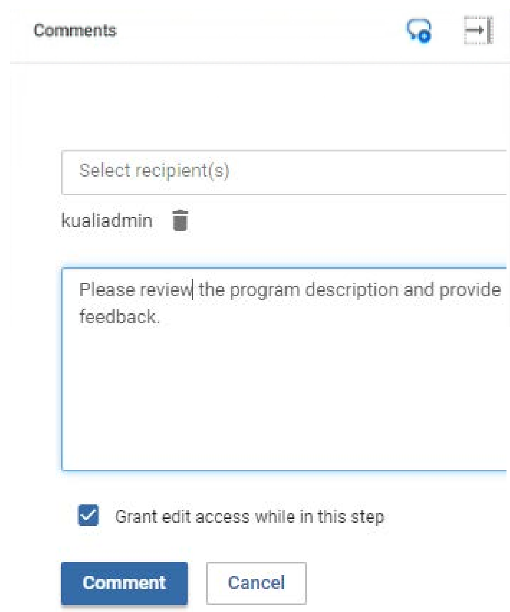


- **Share** your form with another user. Type to search then click to select a user. The user will get an email notification with a link to view the shared form.



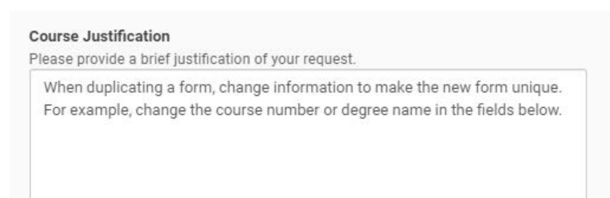
- Add **Comments.** Type to search for users in the recipient(s) field. You may tag multiple users in the comments if you'd like.

> **Comments** are helpful for collaboration. Choose "grant edit access" if you'd like collaborators to be able to revise the form.

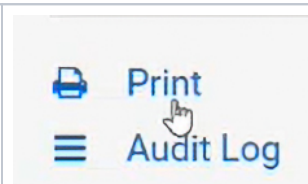


- or **Duplicate** the form. Duplicate forms can be used to reduce manual entry when proposing many similar new items at once. For example, if proposing five courses for a new degree, the duplicate function allows you to use the new course form as a template for the next.

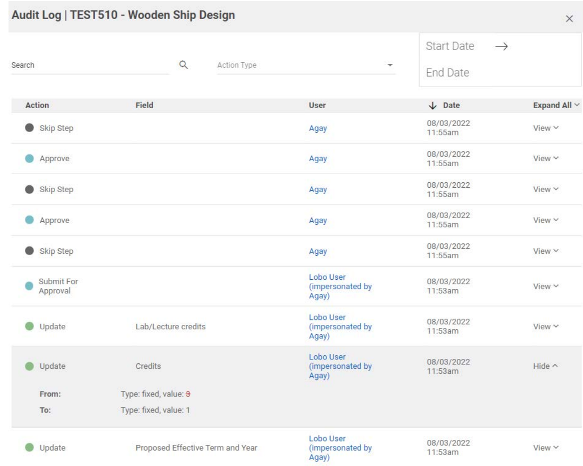
> **Note:** to avoid confusion between your duplicate and the original, give each form a unique information. Change course number, description, or other fields as appropriate.



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.

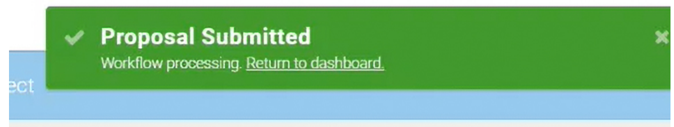


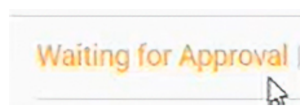
Open the **Audit Log** to see a summary of changes, who made changes, and the date and time of the change.



After submitting your proposal, you can **expand** the workflow steps to see all approvers it will be routed to, department chairs, college deans, and others.

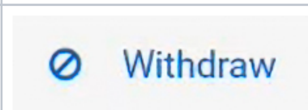
The approval status at each step will update as your proposal makes its way towards full approval.



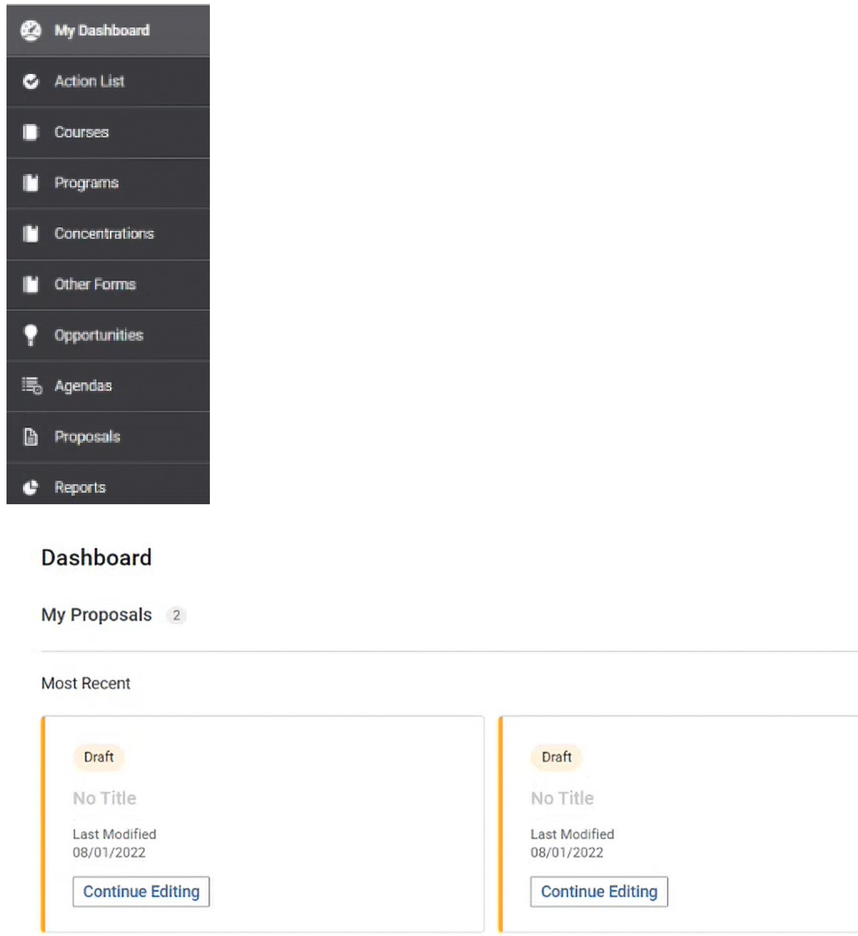


In the event you would like to rescind your submission from the workflow or make changes, you can **Withdraw** your proposal at any time.

> ⚠ This is a permanent action and will reset the workflow. If resubmitted, your proposal will start at the first approval step.

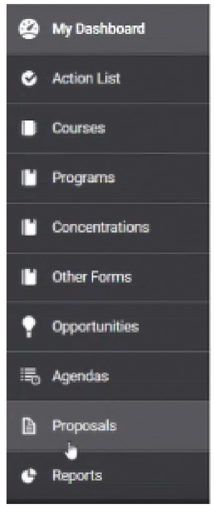


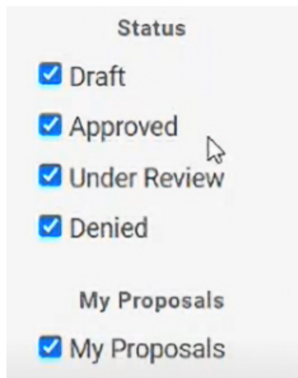
Checking on the Status of a Proposal

#	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.	

<table>
<tr>
<td>2</td>
<td>Navigate to My Dashboard on the left-hand side of the screen and click on the Proposals tab.

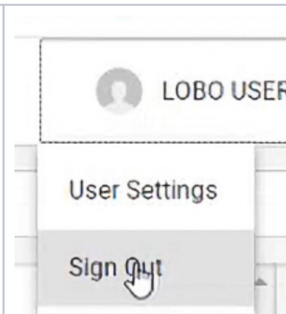
By default, the Proposals tab will show all of the proposals in the system.

To narrow your results, use the Status and My Proposal filters found in the far right menu.</td>
<td>


</td>
</tr>
</table>

You will receive an email notification when an item has reached full approval.

Logging Out

<table>
<tr>
<td>When you find yourself done working in Kuali, navigate to the topmost right corner and select the profile icon. From there, click Sign Out.</td>
<td>
</td>
</tr>
</table>

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.