

Action List Preferences and Setting Filters

The Kual **Action List** provides the user a full list of items to be reviewed and approved. The PI "Request to Certify" proposals also appear in on their Kual Action List.

The user receives an email notification of new items added to the Action List as a handy reminder of what work is "in progress"; for example, when a department administrator creates a proposal.

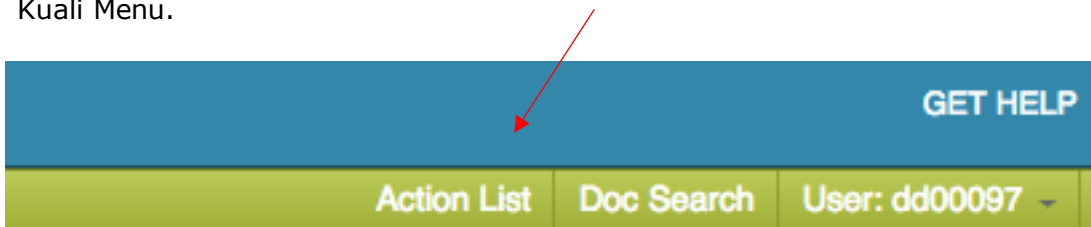
The Department Chair, Dean and Center Director will see a list of all proposals ready for them to review and approve.

Kual Action List "**Filters**" provide the user individual options that allow each user to set how they wish to view items in their Action list.

Kual Action List "**Preferences**", allow users to set the fields displayed on their Action List, as well as to configure their **own email notifications**.

Here is a short tutorial:

1. From your Home Screen, click on **Action List**, located at the top right area of any Kual Menu.



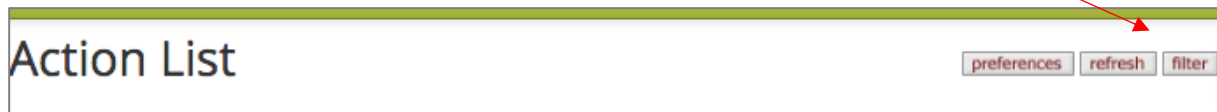
2. View Your Action List. Note that this user has some proposals ENROUTE and some SAVED COMPLETE work. This user wants to hide SAVED/COMPLETE Work.

18 items retrieved, displaying 1 to 10.[First/Prev] 1, 2 [Next/Last]

Id	Type	Title	Route Status	Action Requested	Delegator	Date Created
4328	Proposal Development Document	TEST CBEE Proposal ; Proposal No: 10; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 12/01/2017	ENROUTE	APPROVE		01:51 PM 10/23/2017
4518	Proposal Development Document	This is Only a Test; Proposal No: 38; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 01/08/2018	ENROUTE	APPROVE		09:27 AM 11/02/2017
4655	Proposal Development Document	test for HERD quest; Proposal No: 92; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 11/15/2017	SAVED	COMPLETE		03:03 PM 11/07/2017
4938	Proposal Development Document	Kathy -developing a; Proposal No: 117; PI: Weidong Zhu; Sponsor: National Science Foundation; Due Date: 12/15/2017	ENROUTE	APPROVE		09:00 AM 12/05/2017

3. From the Action List, click **filter** button.

Setting Your Kual Action List Preferences & Filters Quick Card



4. Screen out the viewing of **SAVED /COMPLETE** proposals in this manner:

Action List Filter

Parameters

Document Title	<input type="text"/>	Exclude? <input type="checkbox"/>
Document Route Status	All	Exclude? <input type="checkbox"/>
Action Requested	COMPLETE	Exclude? <input checked="" type="checkbox"/>
Action Requested Group	No Filtering	Exclude? <input type="checkbox"/>
Document Type	<input type="text"/>	Exclude? <input type="checkbox"/>

5. Navigate to the **bottom of the screen** and click the **filter** button.



6. Here are the results after the user removed **SAVED/COMPLETE** Proposals in her action list.

17 items retrieved, displaying 1 to 10.[First/Prev] 1, 2 [Next/Last]

Id	Type	Title	Route Status	Action Requested	Delegator	Date Created
4328	Proposal Development Document	TEST CBEE Proposal ; Proposal No: 10; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 12/01/2017	ENROUTE	APPROVE		01:51 PM 10/23/2017
4518	Proposal Development Document	This is Only a Test; Proposal No: 38; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 01/08/2018	ENROUTE	APPROVE		09:27 AM 11/02/2017
4938	Proposal Development Document	Kathy -developing a; Proposal No: 117; PI: Weidong Zhu; Sponsor: National Science Foundation; Due Date: 12/15/2017	ENROUTE	APPROVE		09:00 AM 12/05/2017
5004	Proposal Development Document	Kathy -developing a; Proposal No: 131; PI: Weidong Zhu; Sponsor: National Science Foundation; Due Date: 12/15/2017	ENROUTE	APPROVE		09:16 AM 12/06/2017

Note: filters and preferences *do not delete* the records, but filters them out of the view mode.

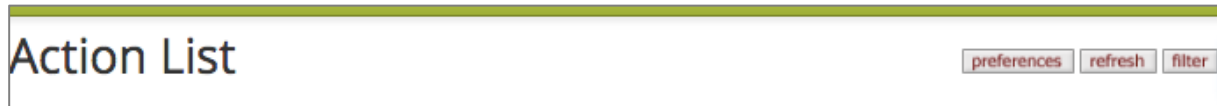
7. To see the records again, just *remove* the filter, using the **clear filter** button.



How to View "Approve" Actions only

Here is another example: a user would like to view *only* APPROVE actions:

1. From the Action List, click **filter** button.



2. Set action requested filter to only view APPROVE actions and remember to click the filter button at the bottom of the screen:

Action List Filter

Parameters

Document Title	<input type="text"/>		Exclude? <input type="checkbox"/>
Document Route Status	All	↕	Exclude? <input type="checkbox"/>
Action Requested	APPROVE	↕	Exclude? <input type="checkbox"/>
Action Requested Group	No Filtering	↕	Exclude? <input type="checkbox"/>
Document Type	<input type="text"/>		Exclude? <input type="checkbox"/>

3. Results: The user will **only see the APPROVE Actions** in the Action List.

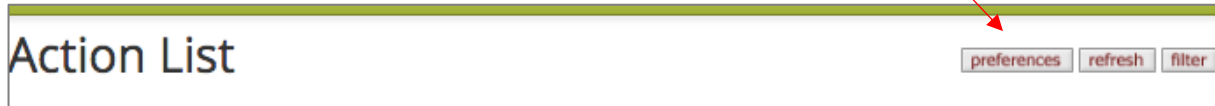
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Id	Type	Title	Route Status	Action Requested	Delegator	Date Created
4328	Proposal Development Document	TEST CBEE Proposal ; Proposal No: 10; PI: Lee Blaney; Sponsor: National Science Foundation; Due Date: 12/01/2017	ENROUTE	APPROVE		01:51 PM 10/23/2017
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HOW to Change Your Email Notifications

Here is how to change your email notification settings.

1. From the Action List, click preferences button.



There are four categories of changes, General, Fields Displayed on Action List, Status Color Preferences, as well as Email Notification Preferences. Below is a screen shot of email Notification Preferences.

Email Notification Preferences

Receive Primary Delegate Emails

Receive Secondary Delegate Emails

Default Email Notification Immediate

Document Type	Notification Preference	Actions
Document Type Notifications <input style="width: 80%;" type="text"/>	None	<input type="button" value="add"/>

Send Email Notifications For

- Complete
- Approve
- Acknowledge
- FYI

HOW to TAKE ACTION on FYI's in your Action List

In the Action List see a dropdown list of Actions. FYI's are a confirmation from the System that an action, such as an APPROVAL has been taken.

To remove the FYI's, set dropdown to FYI and then press the **take actions** button to take all the FYI actions they've set on that screen.

Id	Type	Title	Route Status	Action Requested	Delegator	Date Created	Group Request	Actions	Log
9273	KC Award	KC Award - Nightwatch Time and Money AFT test	SAVED	COMPLETE		09:18 PM 02/23/2018			
9274	KC TimeAndMoney	KC TimeAndMoney - timeandmoney document	SAVED	COMPLETE		09:18 PM 02/23/2018			
9284	KC Notification	All Proposal Persons Certification Completed for 390	FINAL	FYI		11:41 AM 02/27/2018		<div style="border: 1px solid gray; padding: 2px;"> NONE ▼ NONE FYI </div>	
9287	KC Award	KC Award - Nightwatch Time and Money AFT test	SAVED	COMPLETE		11:44 AM 02/27/2018			
9288	KC TimeAndMoney	KC TimeAndMoney - timeandmoney document	SAVED	COMPLETE		11:44 AM 02/27/2018			
9298	KC Notification	All Proposal Persons Certification Completed for 391	FINAL	FYI		12:43 PM 02/27/2018		<div style="border: 1px solid gray; padding: 2px;"> NONE ▼ </div>	

take actions

For help configuring your Action List Filters or Preferences, contact your OSP support person or, email us at OSPA@umbc.edu.

*** End of Document ***