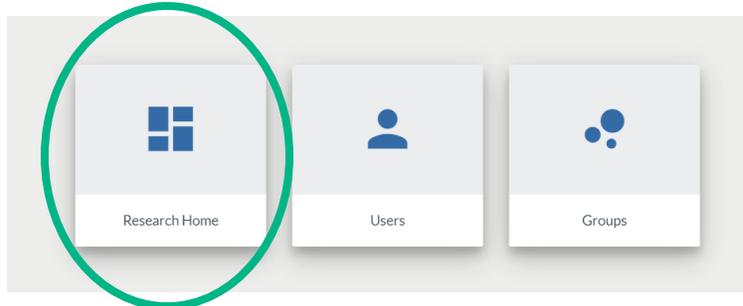


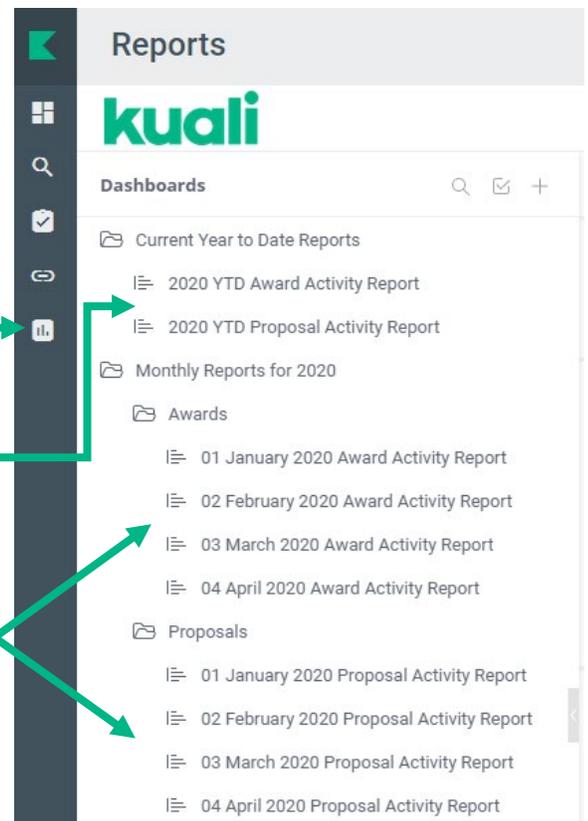
Introduction to Reports in Kualii Research

RAO is introducing Reports in Kualii Research to replace the previous Excel spreadsheets. This will allow you to track proposals and awards in a variety of ways to find the necessary data for your campus areas. Below is an initial introduction to getting started with Reports in Kualii Research.

1. Go to <https://byures.kuali.co/> and login with your BYU NetID and password then click on “Research Home”.

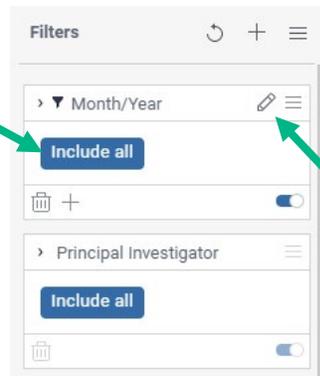


2. To view Reports, select this icon on the left toolbar.
3. You will then see the Reports list that you can choose from. Reports will always display either proposal information or award information.
4. The Current Year to Date Reports folder is dynamic, allowing you to filter or narrow by several data points. YTD reports are always available, and update nightly with the latest proposal information or award information.
5. The Monthly Reports for 2020 folder contains static monthly reports that you can filter or narrow by college and department. These reports will be available at the beginning of the following month.

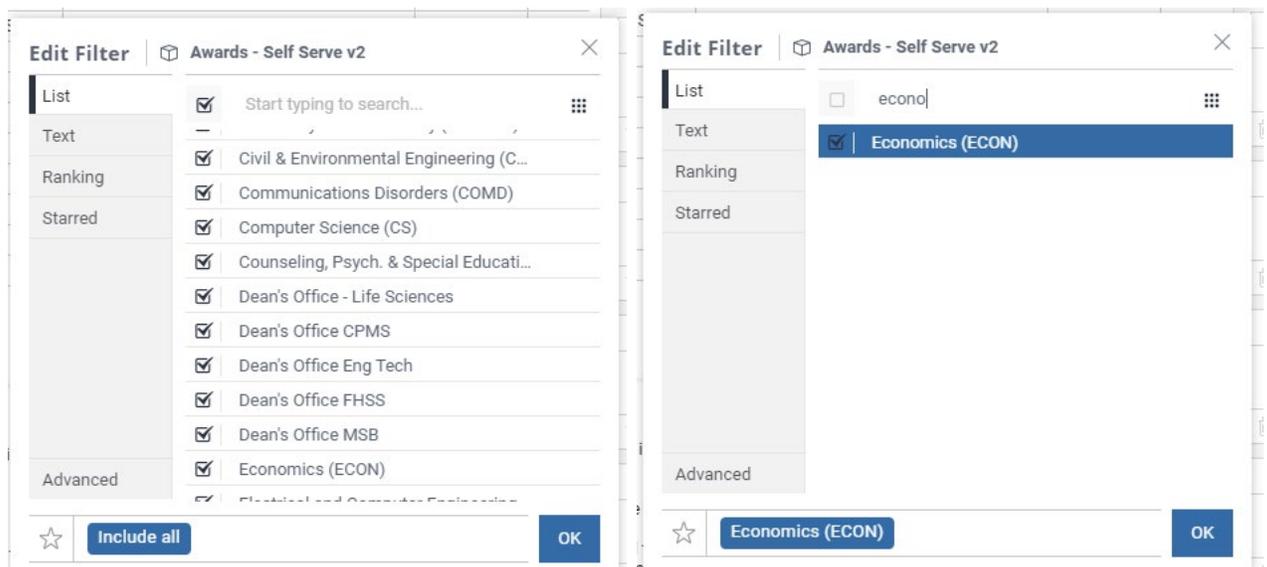


How to Use Filters

6. Each available filter is listed on the right side of the screen. By default, each of the filters should say "Include All".



7. To add a filter, such as Department, first, hover to the right of the filter heading "Department" and left-click on the small pencil that appears.
8. The "Edit Filter" pop-up will appear, with a search bar at the top and a list of the departments. To clear the selection, uncheck the box that is to the left of the search bar. Then, type the name of the department in the search bar and check the box to select that specific department. Now that the filter is activated, "Include All" has been replaced by the selected filter(s). The entire report will reflect whatever filter is added. Multiple filters can be used simultaneously.



9. Quali Research will maintain these filter settings each time you log in until you remove the filters. To remove a filter, follow the same steps above to open the "Edit Filter" pop-up. Now, check the box that is to the left of the search bar. Once you remove the filter, the filter will show "Include All".

Download and Export Options:

10. To download a PDF of this report in the same format that it displays online, use the PDF button in the upper right corner of the report.
11. The data from specific widgets, or areas of the report, can also be downloaded in CSV and/or Excel formatting. To download these spreadsheets, find the header for the specific widget you'd like to download. In the right corner, select the three dots and choose the desired download format. The available format will change based on the widget style.