Action List Preferences and Setting Filters

The Kuali 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 Kuali 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.

Kuali Action List “Filters” provide the user individual options that allow each user to set how they wish to view items in their Action list.

Kuali 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 Kuali 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.

3. From the Action List, click filter button.
4. Screen out the viewing of SAVED /COMPLETE proposals in this manner:

![Action List Filter](image)

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.

![Proposals Table](image)

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:

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

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

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