Introduction to the Action List

Introduction
The Action List screen contains all of the eDocs that require your attention. It displays columns of information in a table format and provides a quick view of the type of document and type of action being requested of you.

How to Get to the Action List
From Within Kuali Coeus
Step 1. Log into Kuali Coeus
Step 2. Click the Action List Button (Located Under the Researcher Tab)

From Within Outlook
You will be prompted via email when an action item requires your attention. For action items related to proposals, the email will contain two links (see below):

- To Respond to this eDoc – This link will take you directly to the eDoc.
- Access the eDoc from Your Action List – This link will take you directly to your Action List.

Your Action List has an eDoc(electronic document) that needs your attention:

Document ID: 1905613
Initiator: Muniz, Jerf
Type: Add/Modify Proposal Development Document
Title: Proposal Development Document - Keck PI Lastname, First I,
Due Date:
To respond to this eDoc:

Or you may access the eDoc from your Action List:
All action items emails contain the following information:

- **Document ID** – The eDoc number.
- **Initiator** – The Person who created the eDoc. This will generally be the PI/Unit Admin.
- **Type** – For Proposals this will read “Add/Modify Proposal Development Document”.
- **Title** – The title of the eDoc. For proposals, this is the proposal title.

**Inside The Action List**

To open a proposal from the Action List, click the ID number and a separate window will pop up, taking you directly into the proposal development document.

The Action List serves as the hub for proposal review/approval. This is where specific actions will be requested of you depending on your role in the proposal development process. All proposals that currently require approval will be listed here.
### Breaking Down the Action List

<table>
<thead>
<tr>
<th><strong>ID</strong></th>
<th>The eDoc number.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>The specific kind of eDoc being routed. For proposals, this will read “Proposal Develop Document”.</td>
</tr>
<tr>
<td><strong>Title</strong></td>
<td>The title of the eDoc. For proposals, this is the proposal title.</td>
</tr>
<tr>
<td><strong>Route Status</strong></td>
<td>Where the eDoc is in the routing process. This will read “Enroute”.</td>
</tr>
<tr>
<td><strong>Action Requested</strong></td>
<td>The action to be completed on the user’s end. The Action Requested will either read “Approve” “Acknowledge” or “FYI”.</td>
</tr>
<tr>
<td>Approve</td>
<td>Requests an approve or disapprove action.</td>
</tr>
<tr>
<td>Acknowledge</td>
<td>Requests an acknowledgment of the viewing of an eDoc.</td>
</tr>
<tr>
<td>FYI</td>
<td>No action required. Used to make users aware of the eDoc.</td>
</tr>
<tr>
<td><strong>Initiator</strong></td>
<td>The person who initiated the eDoc. This will either be the PI/Unit Admin</td>
</tr>
<tr>
<td><strong>Date Created</strong></td>
<td>The date the eDoc was created in Kuali Coeus.</td>
</tr>
<tr>
<td><strong>Log</strong></td>
<td>Contains a summarization of the routing (prior and future) of the eDoc.</td>
</tr>
</tbody>
</table>