# Kuali Build

## End User Guide

Office of Research • Utah State University

*This guide covers end user functionality in Kuali Build*

# How to Use This Guide

This guide is for Kuali Build end users at USU's Office of Research. It covers how to access your apps, submit and manage forms, and respond to task and approval requests.

**Guide Structure**

**Section 1: Accessing Kuali Build:** How to log in, find your apps, and navigate the dashboard.
**Section 2: Document List Management:** Viewing, filtering, and tracking your submitted forms.
**Section 3: Tasks and Approvals:** What to do when you receive a task or approval request by email.

# Section 1: Accessing Kuali Build

Kuali Build is USU's online form and workflow platform. You access it through your web browser — no installation required.

## 1.1 Logging In

Go to **usu.kualibuild.com** and sign in using your USU credentials. You will land on the Kuali Build Dashboard after logging in.

## 1.2 Finding Your Apps

From the Dashboard, use the left navigation bar to browse and manage your apps:

| Navigation Option | What it does |
|---|---|
| **All apps** | All apps you have access to (either created by you or shared with you) will display here. |
| **Favorites** | If you've favorited an app then it will display here.  To favorite or unfavorite an app select or unselect the heart icon on the tile. |
| **My apps** | All apps you've created will display here. |
| **Shared with me** | Any app or product that you haven't created but was shared by another user with you will display here. |

> 💡 **Tip**
> Use the **three-dot menu (⋮)** in the top-right of the any view to sort your apps alphabetically or by creation date.

## 1.3 Finding Your Documents

From the Dashboard, use the top navigation bar to view your actions and documents:

| Navigation Option | What it does |
|---|---|
| **Action List** | This is where you can find documents that require your action (Approve, Acknowledge, or complete a Task). |
| **My Documents-Submitted** | Provides a list of documents that you have submitted, including their status in the workflow process. |
| **My Documents-Drafts** | Provides a list of forms that you have begun but have not yet submitted. You can see when the form was created and how much time has elapsed since then. You can delete any drafts by clicking the trashcan icon. By clicking on the form name, you are also able to make changes and submit. |

# Section 2: Document List Management

The Document List is the table of submitted forms you see when you open an app. It is your primary view for tracking the status of your submissions.

## 2.1 My Documents vs. the App Document List

There are two places in Kuali where documents appear — it is easy to mix them up:

| View | What it shows |
|---|---|
| **My Documents (Dashboard nav bar)** | A submitter's personal view — forms they submitted or saved as drafts, across all apps. |
| **App Document List** | The admin/builder view — all submissions for one specific app. |

> **Tip**
> If you are unable to locate your draft document check My Documents → Drafts in the top navigation bar. If you are still not able to locate this contact the app admin or the USU Kuali support team.

## 2.2 Accessing the Document List

From the Kuali Build Dashboard, click on any app tile. You will land on the Document List by default.

## 2.3 What You Can Do in the Document List

| Option | What it does |
|---|---|
| **Submit a New Form** | Select **New** to create a new form. (Or **fill out form** if there are no submissions yet) |
| **View submissions** | See all documents submitted through this app that you have access to, along with their current workflow status. |

## 2.3 Customizing Your Column View

You can adjust which columns appear in the Document List and in what order. This is especially useful when you want to surface specific form fields at a glance without opening each document.

1. In the Document List, click the column settings icon (typically in the top-left of the list area).
2. Check or uncheck fields to add or remove them as columns.
3. Drag columns to reorder them.
4. Your column configuration is saved per-user and per-app.

## 2.4 Editing a Submitted Document

### Editing a Submission

1. Open the document from the Document List.
2. Open the document action menu (three-dot or gear icon).
3. Select Withdraw and confirm to return it to draft status.

This is only possible when the document hasn't completed the workflow. If it has completed the workflow, reach out to the app administrator to send it back to you.

## 2.5 Deleting a Draft Submission

### Deleting a Submission

1. Open the document from the Document List.
2. Open the document action menu (three-dot or gear icon).
3. Select Delete and confirm.

> ⚠ **Watch out**
>
> Deleting a submission is permanent and cannot be undone.
>
> You can only delete your own draft submissions. Submitted records can only be deleted by an app administrator.

## Section 3: Tasks and Approvals

When a form is routed to you for action, you will receive an email notification from Kuali Build. This section explains what to do when you receive a task or approval request.

### 3.1 Responding to a Task

When you have been assigned a task in Kuali Build, you will have the following options:

- Click the **View Task** button at the bottom of the email to open the record.
- Review all relevant information before taking action.
- Complete any required fields or sections within the form.
- Click the **Send Back** button at any time if you need to return the record to a previous step. A comment box will appear — you may use it to provide context or instructions for the recipient.
- Click the **Workflow Status** button and any up-arrow icons next to each step to view comments from other participants.
- Click the **Mark Complete** button when finished to advance the record to the next step. A comment box will appear — you may use it to leave notes for the next person in the workflow.

### 3.2 Responding to an Approval Request

When a record has been routed to you for review and approval in Kuali Build, you will have the following options:

- Click the **Begin Review** button at the bottom of the email to open the record.
- Review all relevant information and any supporting documentation included in the record.
- Click the **Send Back** button at any time prior to approving if the record needs to be revised or returned to a previous step. A comment box will appear — you may use it to provide context or instructions for the recipient.
- Click the **Workflow Status** button and any up-arrow icons next to each step to view comments from other participants.
- Click the **Approve** button to approve the record and forward it to the next required step. A comment box will appear — you may use it to leave notes for the next person in the workflow.