Kuali Research Quick Guide
Assigning Proposal Access Roles

Overview:

How to give others access to view or edit a proposal and/or budget.

Note: Dept./College Approvers for the proposal Lead Unit already have Viewer access by default. The names of Unit Administrators for the Lead Unit with edit access do not appear in this section. Non-lead unit approvers & administrators must be given access.

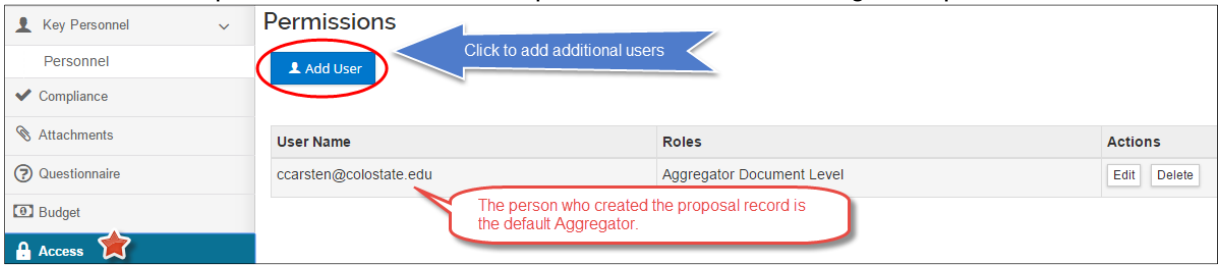
Procedure:

Other qualified users can assist you with the preparation of your proposal. Once the Proposal is initiated in Kuali Research, here is how to assign others full access to edit all sections of your proposal, or limit their role to edit the budget, add/replace/delete attachments, or give access to to view the proposal.

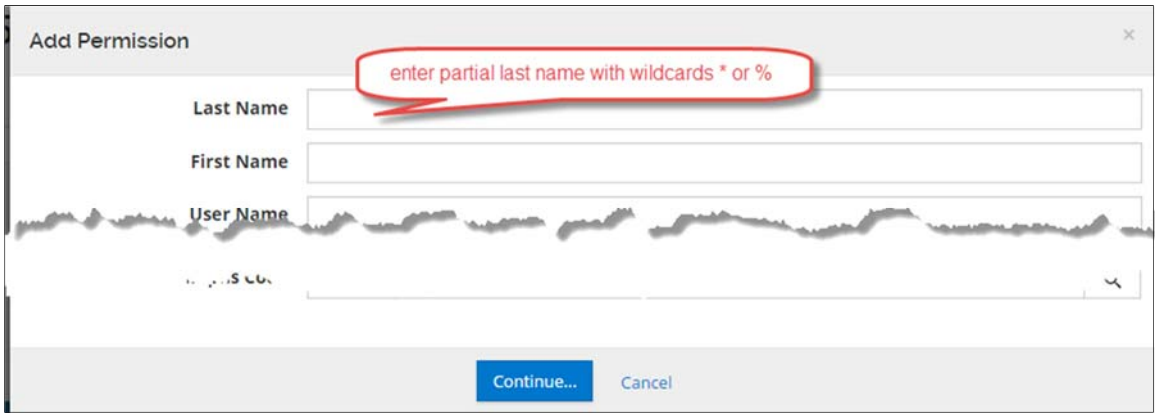
Note: Suggested best practice is to search for the user by last name in the **Last Name** field i.e., *Johnson* and partial **First Name** (with wildcards) to reduce number of results. If the person cannot be found, contact Sponsored Programs (Claudia.amos@colostate.edu or rs_kc_help@mail.colostate.edu).

To assign Proposal Roles:

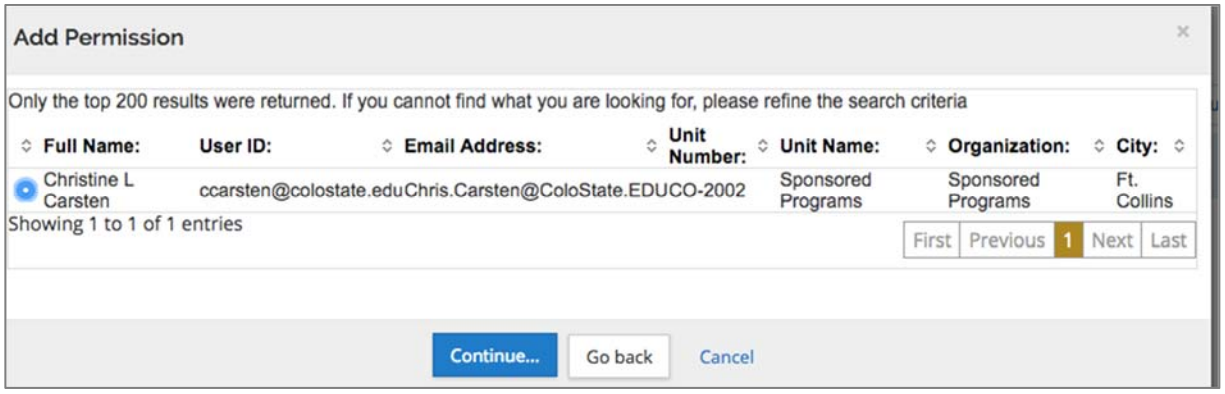
1. While in the Proposal, click the **Access** panel from the left navigation panel.



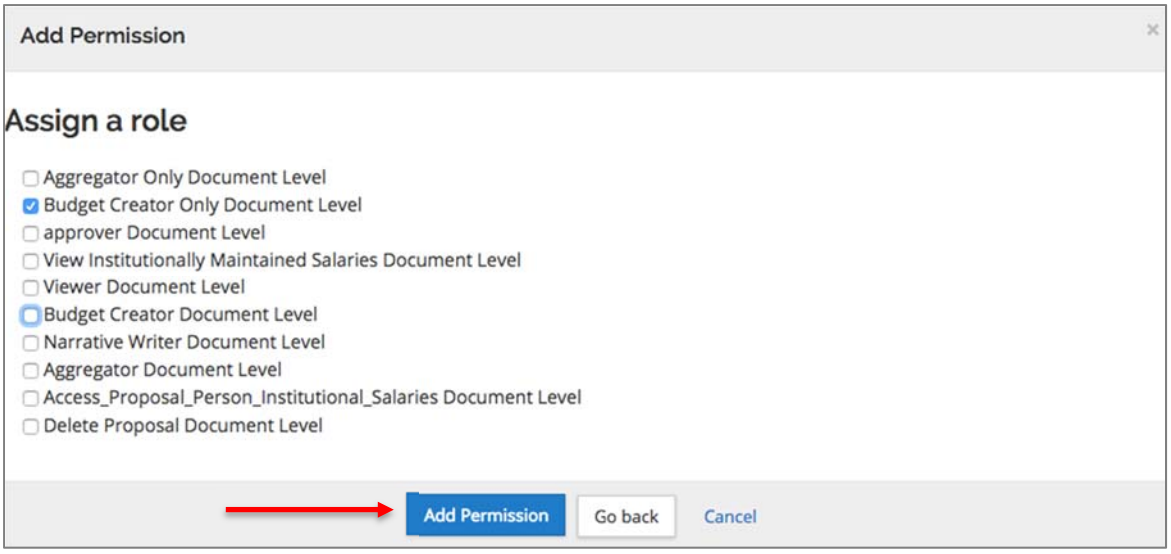
2. To add a user, click the **Add User** button. The **Add Permission** window will open, this is where you should enter the search criteria for the individual and then click the **Continue** button.



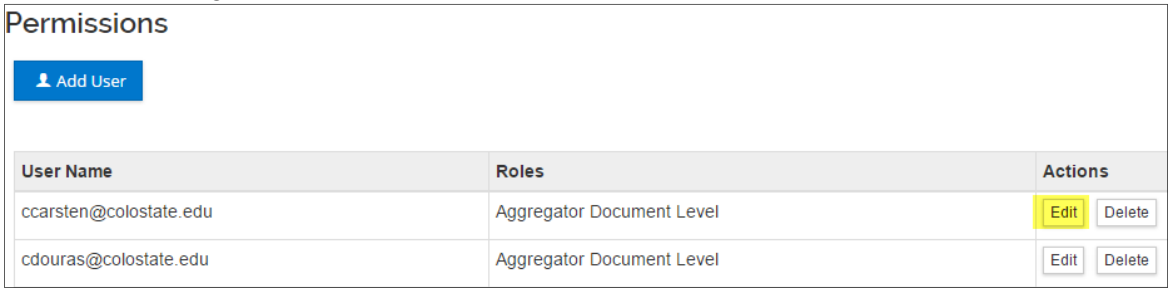
3. From the search results displayed, select the individual you want to grant a role on this proposal by clicking the radio button next to the person's name. Then click **Continue**.



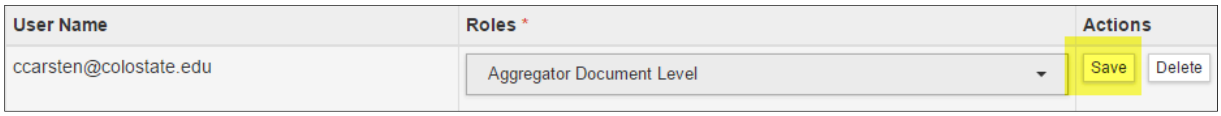
4. Then, in the Assign a role screen, select the proposal role you want to assign to the user selected in the prior step. *(* See the table at the end of the document for role descriptions.)* Click the **Add Permission** button.



5. The user will be added with **edit** and **delete** buttons available in the **Actions** column.
   a. To modify user's assigned role, click the **edit** button and make the necessary changes.



   b. Make sure to click the **Save** button in the Actions column once you are finished making the change.



6. To remove a person from an assigned role/permission section, click the delete button.

   NOTE: Do not delete the only Aggregator.

7. REMEMBER - Click the **Save** button or the **Save and Continue** button at the bottom of the screen.

Proposal Access roles	Use Case
Access_Proposal_Person_Institutional_Salaries Document Level	DO NOT USE
Aggregator Document Level	Full edit permissions, including adding access for additional users, plus submit to review permission
Aggregator Only Document Level	Full edit permissions, except for changing budget rates, plus submit to review permission
approver Document Level	DO NOT USE
Budget Creator Document Level	Permission to create and edit budget versions, plus view proposal data
Budget Creator Only Document Level	Permission to create and edit budget versions, except for rates, plus view proposal data
Delete Proposal Document Level	DO NOT USE
Narrative Writer Document Level	Permission to add/replace/delete attachments, plus view proposal data
View Institutionally Maintained Salaries Document Level	DO NOT USE -- N/A to public institutions of higher education
Viewer Document Level	Permission to view all sections of a proposal