


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.

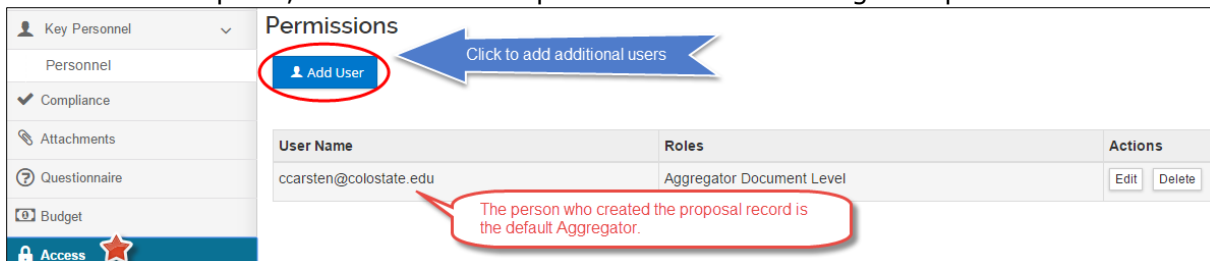
Procedure:

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 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.

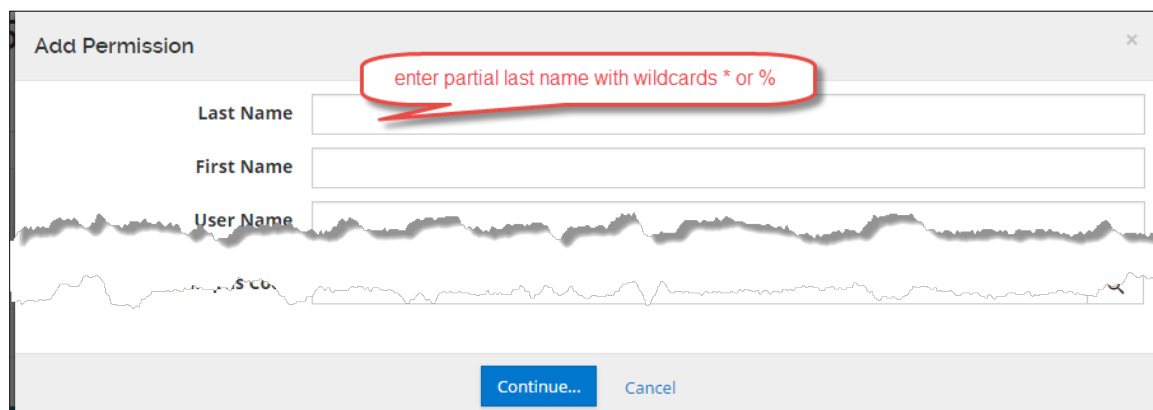
To assign Proposal Roles:

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



User Name	Roles	Actions
ccarsten@colostate.edu	Aggregator Document Level	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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**.

Add Permission

Only the top 200 results were returned. If you cannot find what you are looking for, please refine the search criteria

Full Name:	User ID:	Email Address:	Unit Number:	Unit Name:	Organization:	City:
Christine L Carsten	ccarsten@colostate.edu	Chris.Carsten@ColoState.EDUCO-2002		Sponsored Programs	Sponsored Programs	Ft. Collins

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Continue...
Go back
Cancel

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.

Add Permission

Assign a role

- Aggregator Only Document Level
- Budget Creator Only Document Level
- approver Document Level
- View Institutionally Maintained Salaries Document Level
- Viewer Document Level
- Budget Creator Document Level
- Narrative Writer Document Level
- Aggregator Document Level
- Access_Proposal_Person_Institutional_Salaries Document Level
- Delete Proposal Document Level

→
Add Permission
Go back
Cancel

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.

Permissions

Add User

User Name	Roles	Actions
ccarsten@colostate.edu	Aggregator Document Level	Edit Delete
cdouras@colostate.edu	Aggregator Document Level	Edit Delete

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

User Name	Roles *	Actions
ccarsten@colostate.edu	Aggregator Document Level	<input type="button" value="Save"/> <input type="button" value="Delete"/>

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

NOTES: Do not delete the only Aggregator.
Assigning multiple roles is possible but should only be used for Narrative Writer and Budget Creator roles.

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