Modifying Proposal Permissions

This job aid will walk you through modifying the permissions of your proposal to grant permission for creating, editing or viewing the proposal.

NOTE:

★ Most roles can only be assigned or removed when the proposal is in progress, however the view role can also be granted when the proposal has been submitted for approval routing.

★ The individual who created the proposal will automatically be assigned the aggregator role

★ All proposals must have at least one aggregator; the system will prevent users from removing the aggregator role or individual that is serving this function if all other aggregators have been removed

★ Adjusting roles on the Permissions tab only impacts that specific proposal

★ An appendix has been provided at the end of this document outlining the access provided by each role

WHO:

• Anyone with the Aggregator role

WHEN:

• To grant, remove, or modify roles that will allow others to view or modify a proposal

HOW:

1. Click on the Permissions tab in the Proposal Development Document. Two panels will be displayed:
   • Assigned Roles - displays a list of user names by proposal development role
   • Users - allows individuals to change or remove roles for individuals that have been granted access to the proposal already, or add individuals and assign roles for those that have not

2. Proceed to the sections below to walk through the steps to add, edit and delete roles

3. Review the Assigned Roles panel to verify the changes in user roles
Add Users

1. Enter the MSU net ID in the User Name field or click on the magnifying glass icon to search for the individual that you would like to provide access to your proposal. To perform the search, enter the search criteria for the individual, click the search button, and click return value next to the individual you would like to select.

   ![Users Table]

   **Note:** The KC Person ID and User Name fields utilize the MSU Net ID

2. Select the role for the individual you are adding from the Role dropdown menu

3. Click the add button in the Actions column to finalize your selection

4. Click the save button at the bottom of the screen

Edit Roles

1. Click the edit role button for the desired person in the Actions column on the far right of the Users panel, this will open a small window containing a list of user roles

![Roles Window]

2. Click on the boxes to add or remove roles. (Check the boxes to assign the role, uncheck the boxes to remove the role.)

3. Click the save button at the bottom of the screen
Delete Roles

1. Click the **delete** button in the **Actions** column that appears in the same row of the **Users** panel as the individual you wish to remove access

2. Click **yes** when prompted to confirm that you wish to remove this individual from the list of users for your proposal

3. Click the **save** button at the bottom of the screen to finalize your selection

Appendix: **Role Names and Descriptions**

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewer</td>
<td>An assigned role that allows a person read only access to any part of the proposal.</td>
</tr>
<tr>
<td>Budget Creator</td>
<td>An assigned role that allows a person to make changes to any part of the proposal and budget, but grants read only access to the attachments.</td>
</tr>
<tr>
<td>Narrative Writer</td>
<td>An assigned role that allows a person to make changes to any part of the proposal and attachments, but grants read only access to the budget.</td>
</tr>
<tr>
<td>Aggregator</td>
<td>An assigned role that allows a person to make changes to any part of the proposal, including attachments and budget. Individuals with this role can also view institutional salaries and delete the proposal; because of this, users with this role do not need to be assigned any additional proposal roles.</td>
</tr>
<tr>
<td>Delete Proposal</td>
<td>An assigned role that allows a person to delete the proposal before it is submitted into approval routing. Note that proposals that have been submitted for institutional approvals cannot be deleted.</td>
</tr>
<tr>
<td>Access Proposal Person</td>
<td>An assigned role that allows a person to view salary information for personnel included in the budget. This role must be combined with another role that allows the user to view the proposal and budget to be able to access the proposal information.</td>
</tr>
<tr>
<td>Institutional Salaries</td>
<td>An assigned role that allows a person to view salary information for personnel included in the budget. This role must be combined with another role that allows the user to view the proposal and budget to be able to access the proposal information.</td>
</tr>
<tr>
<td>View Institutionally Maintained Salaries</td>
<td>An assigned role that allows a person to view salary information for personnel included in the budget. This role must be combined with another role that allows the user to view the proposal and budget to be able to access the proposal information.</td>
</tr>
<tr>
<td>Approver</td>
<td>An assigned role that does nothing; assigning this role has no impact (e.g. it will not alter the approval path.)</td>
</tr>
</tbody>
</table>