

Assigning Roles on a Proposal

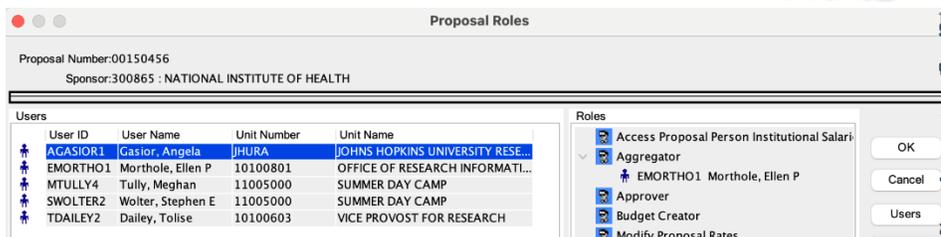
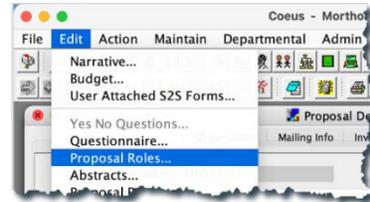
How can someone else add information to the record I started?



At times, the need will arise to grant other people roles on a proposal during its creation. Often, this happens when someone leaves a department and a new person takes over the management of the PD. This is one of the reasons is a good business practice for all departments to have multiple staff who default into all PDs. Also, it may be that people from different departments will collaborate on the construction of a PD.

GRANTING A NEW ROLE ON A PROPOSAL

1. From the menu, choose **Edit>Proposal Roles**.
2. Click on the person's name on the left side to highlight it. Then click, drag and release the name on the role to be granted on the right side.

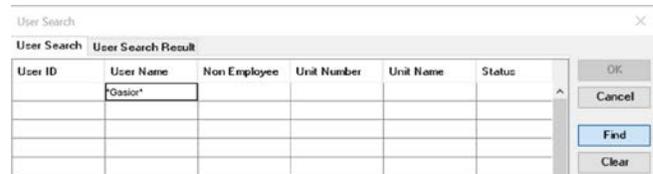


Roles include:

- **Aggregator** = list of persons who 'co-own' proposal. An aggregator can submit a PD.
- **Budget Creator Role** = The individual can only edit the budget.
- **Viewer Role** = The individual can only view and not edit.

To add someone from outside your unit, do the following:

3. Click the **<Users>** button. The **USER SEARCH** window opens.
4. Enter your search criteria (enter ***last name*** in **User Name** field) and click **<Find>**. The results of the search display in the **USER SEARCH RESULT** tab.
5. Highlight the name you want to add and click **<OK>**. The name is added to the Users pane.
6. Select the user, drag and drop the name as in step 2 above. The User's name displays under the assigned role.
***If the user is not available, it means that the person does not currently have a user's account. Contact Coeus-Help@jhu.edu.
7. Click **<OK>** to save changes or click **<Cancel>** to exit without saving.



To remove a user from a role:

1. Click on the name and drag it to the trash can in the lower right corner.