Adding Permissions/Roles on a Proposal

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

At times, the need may arise to grant other people roles on a proposal during its creation. It may be that people from different departments will collaborate on the creation of a Proposal record.

From the Permission Tab:

To Add a User:

☐ Enter the person to be added in the **Person** field. Enter the individual's <last name, first name> or the JHEDID and a dropdown of choices will populate. Click on the name in the dropdown.

☐ Then choose the desired role from the dropdown in the **Roles** dropdown menu.

Roles and function include:

Proposal Aggregator	Edit and submit a proposal for approval
Proposal Budget Creator Role	Edit the budget
View Proposal	the user only has the ability to view

☐ Click on the **Assign Roles** button and then verify the individual has been added to the appropriate list.

To delete a user:

☐ Click on the delete icon 🗑 next to the individual that should be deleted.

User ID	Full Name	Home Unit	Action
AGASIOR1	Gasior, Angel	10100801 - OFFICE OF RESEARCH INFORMATION SYSTEMS	🗑

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