

Assigning Roles on a Proposal



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

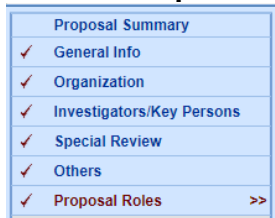
At times, the need will arise to grant other people roles on a proposal during its creation. Often, this happens when someone leaves a department and a new person takes over the management of the PD. This is one of the reasons it is a good business practice for all departments to have multiple staff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

ADDING USERS TO A PROPOSAL

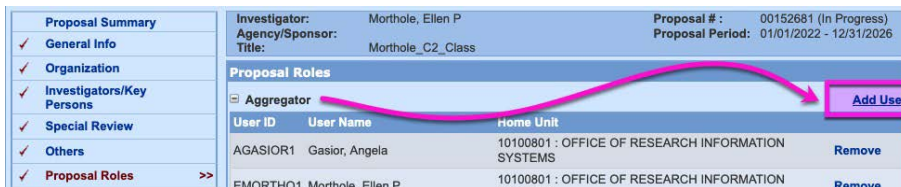
From the Proposal Roles Tab

To add a User:

1. Click on **<Proposal Roles>** in menu.



2. Click on **<Add User>** next to the role you would like to add to the 'co-owner' to this Proposal.



Roles include:

- o **Aggregator** = list of persons who 'co-own' proposal. An aggregator can submit a PD.
 - o **Budget Creator Role** = The individual can only edit the budget.
 - o **Viewer Role** = The individual can only view and not edit.
3. Search for User by entering **last name** and click **<Search>**. Choose appropriate name from the list and click on it.

TO REMOVE USERS FROM A PROPOSAL

1. Click on **<Remove>**. This will withdraw a user's access from this Proposal only.