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**.
- 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.



Proposal Roles										
Proposal Number: Sponsor:	00150456 300865 : NATIONAL	INSTITUTE OF HE	ALTH							
sers				Roles						
User ID	User Name	Unit Number	Unit Name	Access Proposal Person Institutional Salari						
AGASIOR1	Gasior, Angela	JHURA	JOHNS HOPKINS UNIVERSITY RESE	OK OK						
EMORTHO1	Morthole, Ellen P	10100801	OFFICE OF RESEARCH INFORMATI	FINORTHO1 Monthola Ellen R						
MTULLY4	Tully, Meghan	11005000	SUMMER DAY CAMP	Cancel						
SWOLTER2	Wolter, Stephen E	11005000	SUMMER DAY CAMP	Approver						
TDAILEY2	Dailey, Tolise	10100603	VICE PROVOST FOR RESEARCH	Budget Creator Users						
				Modify Proposal Rates						

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.
- 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.

User Search										
User Search User Search Result										
User ID	User Name	Non Employee	Unit Number	Unit Name	Status		OK,			
	"Gasior"					_ [Cancel			
						= [Find	1		
						- 17	Clear			

- Highlight the name you want to add and click <OK>. The name is added to the Users pane.
- 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 <u>Coeus-Help@jhu.edu</u>.

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.