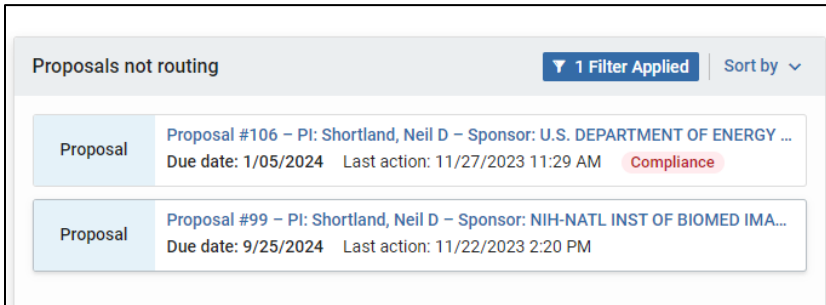


HOW TO GIVE ACCESS TO A PROPOSAL IN KUALI

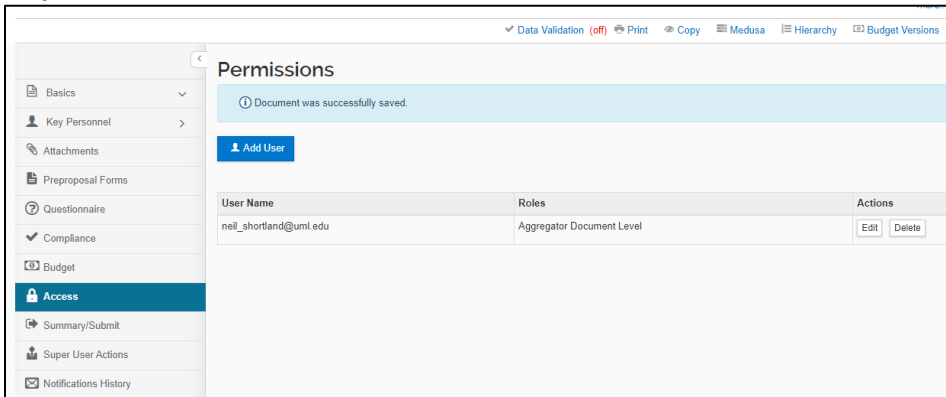
Overview

Access to a proposal is automatic if a person is the PI or listed as a Co-I or Key Personnel on the proposal. If additional personnel need access to the proposal, it can be give through the steps below.

Step 1 – Navigate to the proposal, found in the **Proposals not Routing** section.

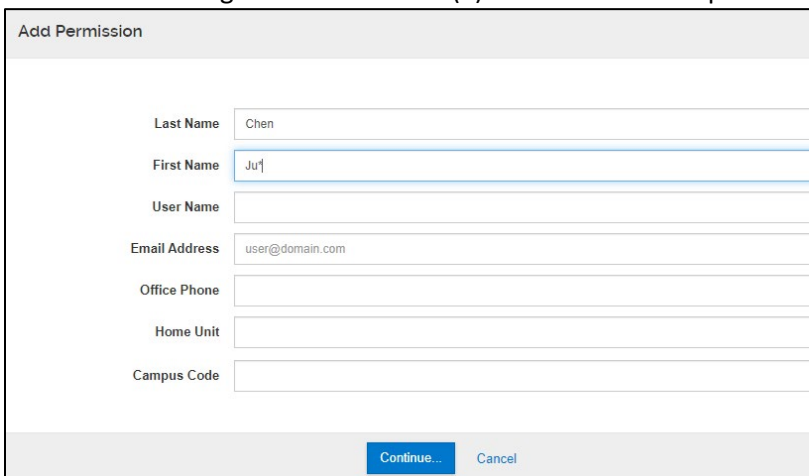


Step 2 – Select the **Access** section and choose **Add User**.

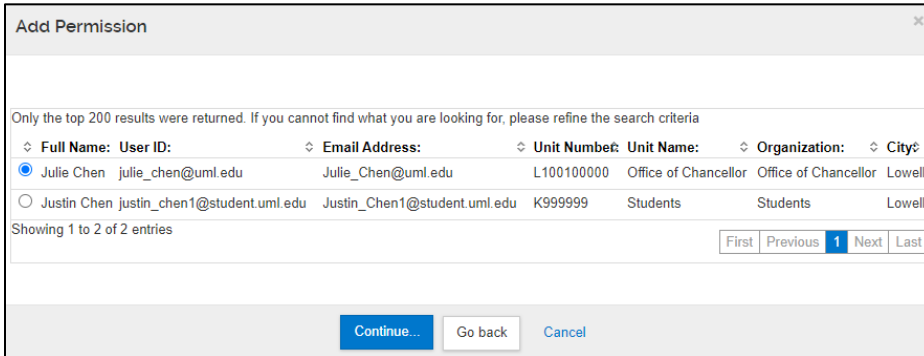


Step 3 – Search for the person’s name.

*Don’t forget that **wildcard’s (*)** can be used to help search for partial entries.



Step 4 – Choose the correct person and click **Continue**.



Add Permission

Only the top 200 results were returned. If you cannot find what you are looking for, please refine the search criteria

Full Name:	User ID:	Email Address:	Unit Number:	Unit Name:	Organization:	City:
<input checked="" type="radio"/> Julie Chen	julie_chen@uml.edu	Julie_Chen@uml.edu	L100100000	Office of Chancellor	Office of Chancellor	Lowell
<input type="radio"/> Justin Chen	justin_chen1@student.uml.edu	Justin_Chen1@student.uml.edu	K999999	Students	Students	Lowell

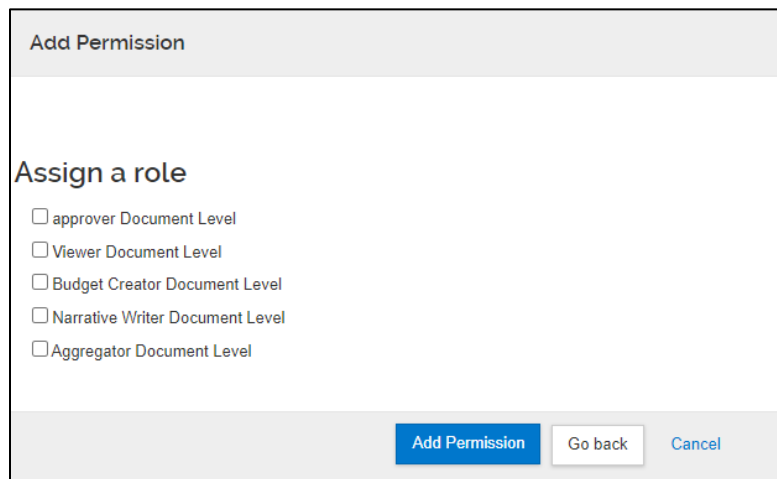
Showing 1 to 2 of 2 entries

First Previous **1** Next Last

Continue... Go back Cancel

Step 5 – Choose the type of permission for the person and click **Add Permission**.

*Note: **Aggregator Document Level** gives a person complete access to the proposal and should be used for administrators assisting with the proposal development.



Add Permission

Assign a role

- approver Document Level
- Viewer Document Level
- Budget Creator Document Level
- Narrative Writer Document Level
- Aggregator Document Level

Add Permission Go back Cancel