

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.

roposals no	routing	▼ 1 Filt	er Applied	Sort by 🗸
Proposal	Proposal #106 - PI: Shortland, Neil Due date: 1/05/2024 Last action: 1) – Sponsor: U.S. DEPA 1/27/2023 11:29 AM	RTMENT OF Compliance	ENERGY
Proposal	Proposal #99 – PI: Shortland, Neil D Due date: 9/25/2024 Last action: 1	- Sponsor: NIH-NATL 1/22/2023 2:20 PM	INST OF BION	MED IMA

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

		🗸 Data Validation (off) 🖶 Print	Ф Сору	📰 Medusa	I≡ Hierarchy	Budget Versions
	Permissions					
Basics	Document was successfully saved.					
L Key Personnel						
N Attachments	1 Add User					
Preproposal Forms						
Questionnaire	User Name	Roles				Actions
✓ Compliance	neil_shortland@uml.edu	Aggregator Document Level				Edit Delete
D Budget						
Access						
Summary/Submit						
La Super User Actions						
Notifications History						

Step 3 – Search for the person's name.

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

Add Permission	
Last Name	Chen
First Name	Jurj
User Name	
Email Address	user@domain.com
Office Phone	
Home Unit	
Campus Code	
	Continue Cancel



Step 4 – Choose the correct person and click Continue.

Add Permiss	sion									×
Only the test 200			finduckature and tables for a							
 Full Name: Julie Chen 	User ID: julie_chen@uml.edu	÷ E	ima what you are looking for, p mail Address: ulie_Chen@uml.edu	¢	Unit Number: L100100000	Unit Name: Office of Chan	¢ cellor	Organization: Office of Chance	≎ ellor	City\$ Lowell
O Justin Chen	justin_chen1@student.uml.ed	u J	ustin_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