Granting Access to Others

PREREQUISITES: Editable Proposal Record, Aggregator Role

!!! Under no circumstances should existing accesses be removed from a proposal!!!

Please contact coeuslitehelp@purdue.edu for assistance with access removal.

Available accesses
- Aggregator - A proposal owner, with rights to do everything. If someone has the aggregator role, there is no need to add the other roles as well.
- Approver - DO NOT USE
- Budget Creator - Allowed to create, modify, and view budgets on the proposal.
- Narrative Writer - Allowed to create, modify, and view narratives on the proposal.
- Viewer - Only able to open the proposal and its budget, narrative, etc in display mode.

Grant Access to Another

1. The Proposal Roles window must first be open
2. To add a specific access, click the “Add User” link next to an available Role
3. A standard User search screen will open.
4. Complete the search for the desired individual.
5. Click on the desired person from the resulting list.
6. That person will now be listed under the specific role selected and be able to complete all tasks for this proposal record allowed by that access role.