UAccess Research Proposal Access Roles

At the appropriate Unit's discretion, a user can be granted global permissions to view proposals, awards, negotiations, and subawards in UAccess Research for the specific Department or College through the Access Flow provisioning tool: https://uarizona.service-now.com/accessflow.

A proposal initiator can grant a user access rights to a specific proposal in the Access section of the proposal development document. When an individual is added via the Access section, that user will have the specific role and permissions for **that proposal only**.

Once a person is added via the 'Add User' button they will be granted rights to that proposal - users added to the Access tab can be deleted or their role changed using 'Edit' or 'Delete'. **Prior to routing**, any role can be granted, however, **once the proposal has been submitted for review** only the view role can be added.

The initiator of a proposal is automatically granted the aggregator role in the Access tab. **Do not delete the initiator** as this may cause data integrity and access issues.

Below outlines the different roles available.

- **Aggregator Document Level:** The Aggregator role allows a user **full access** to the proposal. This is the highest administrative permission level for a proposal, and only individuals who have Aggregator permissions, or are in the SPS office **can submit a proposal for review**. This role **allows a user to modify attachments and recall a document that is enroute**. *The initiator of a proposal is automatically granted the Aggregator role in the document.*

  This role also allows a user to see institutional salaries, modify budgets, and rates in the proposal when the detailed budget (budget builder) is in use. *Please note that only the summary budget is in use at this time.*

- **Budget Creator Document Level:** This role allows a user to **create and maintain budgets** and to **view all other data** in the proposal.

  This role also allows a user to view institutional salaries and modify rates in the proposal when the detailed budget (budget builder) is in use. *Please note that only the summary budget is in use at this time.*

- **Narrative Writer Document Level:** This role allows a user to **modify the data** the proposal, **including the attachments**. It provides **view only access to the budget.**

- **Viewer Document Level:** This role gives a user the ability to **view all data** in the proposal but **does not allow them to change any data** in the proposal or budget.

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The following roles are slightly more nuanced and are not recommended for use in UAccess Research at this time.

- **Aggregator Only Document Level:** This role is a **more limited form of Aggregator.** An Aggregator Only **can modify all proposal, budget, and attachment data.** They can **submit a proposal document** for review, but **cannot recall** the proposal after it has been submitted for review.

  This role does not allow a user to see institutional salaries, modify budgets, and rates in the proposal after it has been submitted for review when the detailed budget (budget builder) is in use. *Please note that only the summary budget is in use at this time.*

  Members of this role are **not included in the Aggregator search field** in the Proposal Development search.

- **Budget Creator Only Document Level:** This role allows a user to **view a proposal, as well as create and maintain budgets in the proposal.**

  It **does not** provide access to institutional salaries, or the ability to change rates in a budget when the detailed budget (budget builder) is in use. *Please note that only the summary budget is in use at this time.*