

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.*

The screenshot shows the 'Access' tab in the UAccess Research Proposal system. The top left displays 'Proposal Development' and 'Proposal: [redacted] PI: Not yet assigned'. The top right shows 'Document Info' with 'Sponsor Name: [redacted]', 'Status: In Progress', and 'Initiator: Shana M McClelland (shana)'. A green arrow points from the 'Initiator' field to the 'shana' user in the permissions table. A blue notification bar at the top says 'Document was successfully saved.' The 'Permissions' section has an 'Add User' button and the text 'Add additional user access here'. The permissions table is as follows:

User Name	Roles	Actions
shana	Aggregator Document Level	Edit Delete

Below the table, there is a red warning: 'Initiator automatically made aggregator. Do not delete!'. At the bottom, there are buttons for 'Back', 'Save', 'Save and Continue', and 'Close'.