

How to Add a Collaborator to a Proposal

1 Open the appropriate proposal.

The screenshot displays a web application for managing proposals. At the top, a navigation bar includes links for 'als', 'Projects', 'Awards', 'Subawards', 'Reporting', and 'More'. Below this, a breadcrumb trail shows 'e Projects / Example 11.3.25 Recording / 26-0099-P0001'. The main title is 'Example 11.3.25 Recording'. A 'Proposal Summary' tab is active, showing a grid of fields: 'PI: --', 'Sponsor: --', 'Project Start Date: --', 'Admin Unit: --', 'Prime Sponsor: --', 'Project End Date: --', 'Sponsor Deadline: --', 'Instrument Type: --', and 'Total Sponsor Costs: --'. A 'Project: 26-0099' is listed on the right. On the left, there are buttons for 'Complete Review' and 'Route for Review'. A status bar at the top right indicates 'In Development'. Below the summary, a tabbed interface shows 'Proposal Form', 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', 'Links', and 'Admin Only'. A note at the bottom right states 'All changes save automatically'. The 'Additional Information' section is expanded, showing a 'Submission Notes' field with the prompt 'Enter any additional comments on this proposal:'. A sidebar on the left lists 'Proposal Sections' with checkmarks: 'General Information', 'Personnel', 'Mandatory Compliance', 'Grant Control', 'Design Support & Collaboration', and 'Information Sharing'.

2 Click the "Access" tab.

The screenshot shows a web application interface for 'Example 11.3.25 Recording'. At the top, there is a navigation bar with tabs: Proposals, Projects, Awards, Subawards, Reporting, and More. Below this, a breadcrumb trail reads 'My Active Projects / Example 11.3.25 Recording / 26-0099-P0001'. The main heading is 'Example 11.3.25 Recording'. On the left, under 'My Actions', there are buttons for 'Complete Review' and 'Route for Review'. The 'Proposal Summary' section on the right contains fields for PI, Sponsor, Project Start Date, Admin Unit, Prime Sponsor, Project End Date, Sponsor Deadline, Instrument Type, and Total Sponsor Costs. Below the summary, a horizontal tab bar includes 'Proposal Form', 'Routing', 'History', 'Access' (highlighted with an orange circle), 'Tasks', 'Notes', 'Attachments', 'Links', and 'Admin Only'. The 'Access' tab is active, showing a 'Proposal Sections' table with six rows (General Information, Key Personnel, Regulatory Compliance, Export Control, Foreign Support & Collaboration, Information Sharing) all marked with green checkmarks. To the right of this table is the 'Additional Information' section, titled 'Submission Notes', with a text area for comments.

3 Click "Add Person".

This screenshot shows the 'Access' tab within the 'Example 11.3.25 Recording' page. The 'Access' tab is selected in the horizontal tab bar. The 'Access' section has a title bar with 'Edit' and 'Add Person' buttons, with 'Add Person' highlighted by an orange circle. Below the title bar, there is a text input field for 'Email' and a 'View' button. A message states 'No team members have been assigned to this proposal.' At the bottom right, there is a 'My Tasks' sidebar with a red notification icon and a blue question mark icon.

4 Type the name of the person you would like to view and/or edit your proposal.

Example 11.3.25 Recording

The screenshot shows the 'Proposal Access' form within a larger application. The top section, 'My Actions', contains buttons for 'Complete Review' and 'Route for Review'. The 'Proposal Summary' section displays various fields like PI, Sponsor, Project Start Date, etc. Below these is a tabbed interface with 'Access' selected. The 'Proposal Access' form itself has a header 'Manage who can view or edit the proposal.' and a table with columns 'Person', 'Email', and 'View'. A search input field in the 'Person' column is highlighted with an orange circle, containing the text 'Add a new person...'. A 'Cancel' button is visible in the top right corner of the form.

5 Click the person in the drop down menu.

Example 11.3.25 Recording

This screenshot shows the same 'Proposal Access' form as the previous one, but with a dropdown menu open in the 'Person' column of the table. The dropdown menu lists three options: 'Irene Inv', 'Expand All', and 'Irene Investigator'. The 'Irene Investigator' option is highlighted with an orange circle. The rest of the form, including the 'My Actions' and 'Proposal Summary' sections, remains the same.

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If you would like this person to have edit access, ensure the edit checkbox is clicked.

3.25 Recording

The screenshot shows the 'Access' tab of a proposal management interface. At the top, there's a 'Proposal Summary' section with fields for PI, Sponsor, Project Start/End Dates, Admin Unit, Prime Sponsor, Instrument Type, Sponsor Deadline, and Total Sponsor Costs. A dropdown menu shows 'In Development'. Below this is a table with columns for 'Investigator', 'Email', 'View', and 'Edit'. The first row shows 'Investigator' and 'morgan.chapman+investigator@cayuse.com'. The 'View' checkbox is checked, and the 'Edit' checkbox is highlighted with an orange circle. At the bottom right, there's a 'My Tasks' sidebar with a red notification badge and a help icon.

Investigator	Email	View	Edit
Investigator	morgan.chapman+investigator@cayuse.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Click "Save".

3.25 Recording

This screenshot is identical to the previous one, but the 'Save' button in the top right corner of the 'Access' section is highlighted with an orange circle. The 'Edit' checkbox for the investigator is also checked, indicating that the user has granted edit access and is now saving the changes.

- 8 If you need to edit someone's access to your proposal, click "Edit".

3.25 Recording

Proposal Summary

In Development

Project: 26-0099

Routing History Access Tasks Notes Attachments Links Admin Only

Access

view or edit the proposal.

Email	View	Edit
morgan.chapman+investigator@cayuse.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

My Tasks

?

- 9 You can remove their access to edit the proposal by unchecking the edit box. Be sure to click save so your changes aren't lost.

3.25 Recording

Proposal Summary

In Development

Project: 26-0099

Routing History Access Tasks Notes Attachments Links Admin Only

Access

view or edit the proposal.

Email	View	Edit
morgan.chapman+investigator@cayuse.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel + Save

My Tasks

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You can remove their access entirely by clicking the trash can icon. Be sure to click save so your changes aren't lost.

3.25 Recording

Proposal Summary

In Development

Project: 26-0099

Routing History Access Tasks Notes Attachments Links Admin Only

Cancel Save

view or edit the proposal.

Email	View	Edit
morgan.chapman+investigator@cayuse.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

My Tasks

?