

Share a Workspace Proposal with Others and ORA

- You do NOT need to add Authorized Organization Representative (AOR) on your application. By default, they will be able to see the application.

Adding UMD participants

NOTE: all participants you wish to add, must have a Grants.gov account.

- a. Click on the “Participants” tab.
- b. Click on the [Add from Workspace Organization] button.

The screenshot shows the 'MANAGE WORKSPACE' interface. At the top, there are status indicators: 'Created', 'Forms Passed', 'Complete and Notify AOR', 'Submit', and 'Agency Received'. A yellow message box says 'Participant successfully removed'. Below this, workspace details are listed: Application Filing Name: CMK-test, Workspace ID: WS00003719, Workspace Status: In Progress, Opening Date: Nov 01, 2017, Closing Date: Nov 01, 2020, Workspace Owner: Christine Kang, and SAM Expiration Date: Jan 01, 2020. The 'PARTICIPANTS' tab is selected and highlighted. Below the tabs, there are buttons for 'Export Detailed Data', 'Add from Workspace Organization', and 'Add by Username'.

- c. Search for the participant’s name. Add the person by clicking the Add Checkbox next to his/her name under the Actions column then click the [Save] button.

The screenshot shows a search interface. At the top, it says 'Please enter criteria and click Search:'. There are input fields for 'First Name', 'Last Name' (with 'egloff' entered), and a 'Role' dropdown menu set to 'All Active Applicants'. A 'Search' button is to the right. Below this, a blue header says 'Select Applicants and Click Save (1 selected applicants)'. A table shows 1-1 of 1 Records. The table has columns: Username, First Name, Last Name, Phone Number, Email, AOR Role, Manage Workspace Role, and Actions. The row for 'SEGLOFF0001' has 'Sally' as First Name, 'Egloff' as Last Name, '301-405-8060' as Phone Number, and 'segloff@umd.edu' as Email. The 'Actions' column for this row has an 'Add' button with a checked checkbox. Below the table, there is a 'Save' button and a 'Cancel' button.

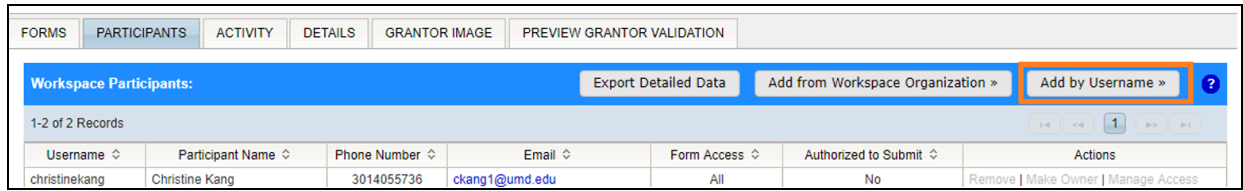
- Participants will have the “All Forms including budget” access selected by default. Later, if you find the participant should have more limited access, please change the access by clicking on the “Manage Access” link under Actions and adjust the access accordingly. Once done click the [Save] button.

The screenshot shows the 'Manage Access' interface. It has a blue header with the title 'Manage Access'. Below the header, it says 'Please specify Form Access:'. There is a text box containing the following information: Username: wegloff, Name: Wilbur Egloff, Email: segloff@gmail.com. Below this, there are two radio buttons for 'Form Access': 'All Forms including Budget' (which is selected) and 'Non-Budget Forms'. At the bottom, there are 'Save' and 'Cancel' buttons.

Adding Non-UMD Participants

Note: In order to add a non-UMD participant, you need to know the participant's Grants.gov username.

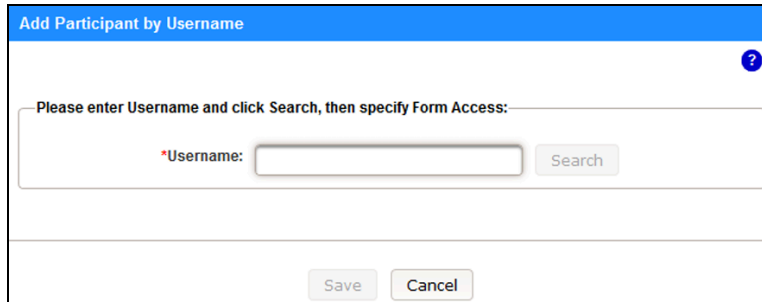
- a. Click on the "Participants" tab.
- b. Click on the "Add by Username" button.



The screenshot shows the 'Workspace Participants' interface. At the top, there are tabs for 'FORMS', 'PARTICIPANTS', 'ACTIVITY', 'DETAILS', 'GRANTOR IMAGE', and 'PREVIEW GRANTOR VALIDATION'. Below the tabs, there are buttons for 'Export Detailed Data', 'Add from Workspace Organization', and 'Add by Username'. The 'Add by Username' button is highlighted with an orange box. Below the buttons, there is a table with the following data:

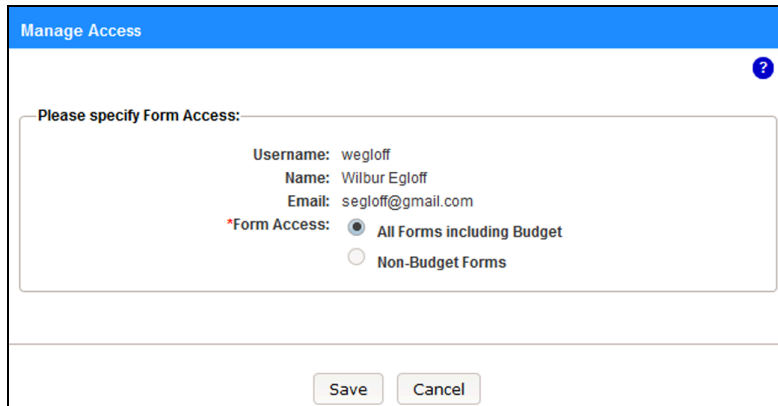
Username	Participant Name	Phone Number	Email	Form Access	Authorized to Submit	Actions
christinekang	Christine Kang	3014055736	ckang1@umd.edu	All	No	Remove Make Owner Manage Access

- c. Enter the person's Username in the field and click the "Search" button.



The screenshot shows the 'Add Participant by Username' form. It has a blue header with a question mark icon. Below the header, there is a text input field labeled '*Username:' and a 'Search' button. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

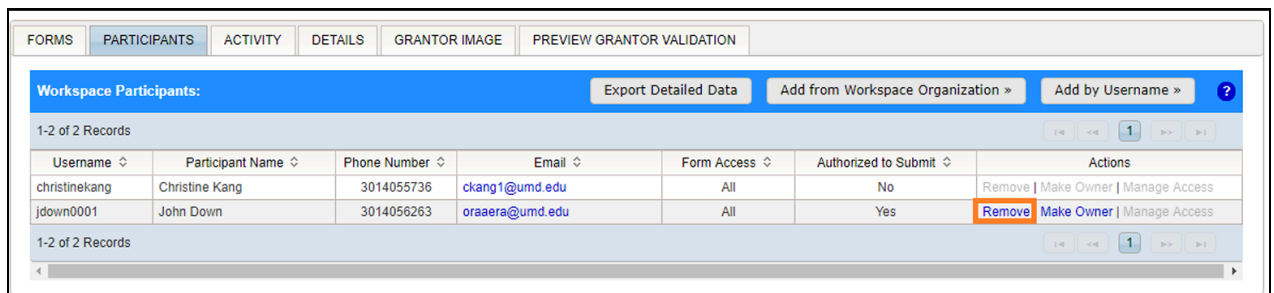
- d. Choose the access that this participant should have, then click the "Save" button.



The screenshot shows the 'Manage Access' form. It has a blue header with a question mark icon. Below the header, there is a text input field labeled 'Please specify Form Access:'. Below the input field, there is a form with the following fields: 'Username: wegloff', 'Name: Wilbur Egloff', 'Email: segloff@gmail.com', and '*Form Access:'. The 'Form Access' field has two radio buttons: 'All Forms including Budget' (selected) and 'Non-Budget Forms'. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Removing a Participant

- a. Click on the "Participants" tab.
- b. Click the "Remove" link under Actions.



The screenshot shows the 'Workspace Participants' interface. At the top, there are tabs for 'FORMS', 'PARTICIPANTS', 'ACTIVITY', 'DETAILS', 'GRANTOR IMAGE', and 'PREVIEW GRANTOR VALIDATION'. Below the tabs, there are buttons for 'Export Detailed Data', 'Add from Workspace Organization', and 'Add by Username'. The 'Add by Username' button is highlighted with an orange box. Below the buttons, there is a table with the following data:

Username	Participant Name	Phone Number	Email	Form Access	Authorized to Submit	Actions
christinekang	Christine Kang	3014055736	ckang1@umd.edu	All	No	Remove Make Owner Manage Access
jdown0001	John Down	3014056263	oraera@umd.edu	All	Yes	Remove Make Owner Manage Access

More information may be found on the [grants.gov online user guide](#).