Delegating Access

Interest Areas: Giving access to your proposal records

Overview

- Edit and/or view access may be delegated to another person.
  - Access may be granted to more than one other person.
- Any user (e.g., investigator, administrator) may delegate to any other person in the PennERA "people" database.
  - Not limited to others in the same department.
- Permits access to all proposals and messages
  - Cannot delegate specific proposals.
- Investigators cannot delegate certification authority that is part of the finalization process prior to submitting proposals for internal review and approval.

Profile Delegation

Click on My Profile tab to begin, then click Edit.

- Begin typing name after clicking Add.
  - List can be automatically scrolled by beginning to type the first or last name until the desired name is reached.

- After the screen has refreshed, the selected name will appear.
- Click on the blue cross to open and Select the module.

- Click on "Edit" or "View" for Access Type.

- Access can be removed by clicking on the Remove icon.

NOTE: The Calendar function is not currently being used.

If this user has been delegated access by another user, that information will be displayed in the lower portion of this screen.

Contact PennERAhelp@lists.upenn.edu if you have any questions.

1 See Investigator Reference, items 5-9 of "Certify and submit a proposal", or pp. 64 and 66 of the Proposal Development User's Guide.