


EXTEND ACCESS by PI

In PeopleSoft *ROLA II*, Extend Access by PI (which includes delegation of signing authority) is found within the *Authorization & Access* section of the menu. You are only able to view your own information within this function.

Extend Access by PI allows you to assign other users the ability to view, maintain and/or access your **Proposal**, **Award** and **Project** details at whatever level is appropriate for you and your supporting users.

You can add  as many authorized users as you wish by working through the following steps.

Research WESTERN

Menu

Search:


- My Favorites
- UWO Menu
- Grants (ROLA II)
 - Sponsored Research
 - Proposals
 - Awards
 - Grant Support
- Authorization & Access
 - Acknowledge Access Request
 - Extend Access by PI**
 - Acknowledge Access to PI data
 - Researcher Grants Access Rost
- Relationship Management
- Project Costing
- Reporting Tools
- PeopleTools
- My Personalizations







Extend Access

Business Unit UWO

PI ID RWECULLEN Cullen,Edward

Access is being granted to the following researchers: [Find](#) | [View All](#) | First 1 of 2 Last

User ID BROXSOM Brossom,Patt 

	Effective Date	Seg	Maintain Proposal	Details	View Awards	Status	
1	06/26/2009	0	None			Done	
2	09/12/2009	0	Selected			Done	
3	09/12/2009	1	Selected		All	Done	
4	05/12/2009	0	All			Done	

Grants (ROLA II) > Authorization & Access:

Choose *Extend Access by PI* from the left menu

Extend Access by PI
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: begins with

Include History Correct History

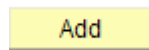
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results
View All First 1 of 1 Last

[Find an Existing Value](#) | [Add a New Value](#)

If this is the first person you are extending access to, you will need to *Add a New Value* to establish a record for your information.

Choose the Add a New Value tab and then click on the



button.

Extend Access by PI

[Find an Existing Value](#) [Add a New Value](#)


Business Unit:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

The *Extend Access* panel will enable you to view and maintain the rows for those individuals you have already extended access to and add additional users to your record. To view all those you have extended access to, click View.

You can grant authorized access to your information for any current employee in HR system as follows.

Click the  sign of the last row in your record.

Extend Access

Business Unit UWO
PI ID SHANNON Woodhouse,Shannon M

Access is being granted to the following researchers: Find View 1 First 1-2 of 2 Last


User ID CSIROYT2 Siroyt-Vandelaar,Christine +

Effective Date	Seq	Maintain Proposal	View Awards	Status	
1 06/10/2009	0	None		Done	+
2 02/10/2009	0	All		Done	+

User ID RWISWAN Swan,Isabella +

Effective Date	Seq	Maintain Proposal	View Awards	Status	
1 06/10/2009	0	All		Done	+

Save Return to Search Notify Add Update/Display Include Hist

Click on the search icon  next to the USERID field to identify the individual to which you wish to extend access.

User ID +

Effective Date	Seq	Maintain Proposal	View Awards	Status	
1 10/06/2009	0	<input type="text"/>	<input type="text"/>	Pending	+

Search for the individual by PeopleSoft USERID or Name.

If Name, type in the LAST name and click [Look Up](#)

A list of those individuals with this last name will appear. Click on the name of the individual you wish to extend access to from the list.

- Grants (ROLA II)
 - Sponsored Research
 - Proposals
 - Awards
 - Grant Support
- Authorization & Access
 - Audit
 - Security Audits
 - [Grants Access Request](#)
 - [Acknowledge Access Request](#)
 - [Authorize Access Request](#)
 - [Activate Access Request](#)
 - [Grants Access Inquiry](#)
 - [Extend Access by PI](#)
 - [Acknowledge Access to PI data](#)
 - [Researcher Grants Access Rqst](#)
- Relationship Management
- Agreement
- Sponsors

User ID:

Name:

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

[View All](#) First 1-100 of 112 Last

User ID	Name
ASMIT257	Smith,Alan
ASMIT292	Smith,Alisha
ASMIT294	Smith,Allison
ASMIT227	Smith,Allison M
ASMIT336	Smith,Amanda FD
ASMITH39	Smith,Andrew David Allan
ASMIT66	Smith,Andrew J
ASMIT73	Smith,Angie
ASMIT337	Smith,Ashley
C:SMIT244	Smith Cameron

Choose the access appropriate for the individual for your Proposal and/or Award information.

The functions available are:

Maintain Proposal	Ability to create, view and maintain proposals including initial submit (PI final submit is still required)
View Awards	Ability to view Award/Project record

The levels of access available are:

None	No access is granted at this level to any information
Selected	Access is granted for individual Proposals, Awards or Projects associated with the PI who is granting the access by clicking on the Details icon that appears to the left of the dropdown box. Then search for the individual Proposal, Award or Project numbers that you wish to grant access to. Follow the steps on the next page.
All	Access is granted for all Proposals, Awards or Projects associated with the PI who is granting the access

Extend Access

Business Unit: UWO
 PI ID: SHANNON Woodhouse, Shannon M

Access is being granted to the following researchers: Find | View 1 First 1-2 of 2 Last


User ID CSIROYT2 Siroyt-Vandelaar, Christine

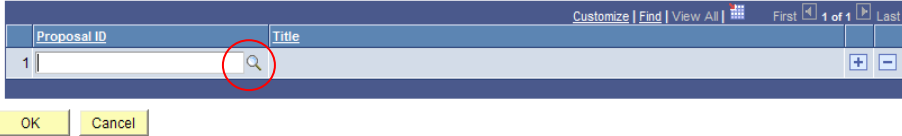
Effective Date	Seq	Maintain Proposal	Details	View Awards	Status
06/10/2009	0	None			Done
10/06/2009	0	Selected			Pending
02/10/2009	0	All			Done

User ID RWISWAN Swan, Isabella

Effective Date	Seq	Maintain Proposal	View Awards	Status
06/10/2009	0	All		Done

IF you decide to give an individual SELECTED access (limiting access to one or more of your grants, but not all) please continue to this next section:

Click on the search icon  to choose from any of your Proposals or Awards.



Look Up Proposal ID



Click the appropriate Proposal or Award

Search Results

[View All](#)

Business Unit	Proposal ID	Sponsor	Funding Source	Program Name
UWO	0000000027	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INSTITUTIONAL
UWO	0000000031	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INDIVIDUAL WIT
UWO	0000000043	Council of Research Western	Council of Research Western	EXTERNAL INSTITUTIONAL
UWO	0000000045	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWO	0000000046	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWO	0000000052	Foundation Virginia	Foundation Virginia	PROGRAM FOR FOUNDATI
UWO	0000000053	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWO	0000000055	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL DEPARTMENT.F
UWO	0000000060	Council of Research Western	Council of Research Western	EXTERNAL DEPARTMENT.F
UWO	0000000061	Council of Research Western	Council of Research Western	EXTERNAL INDIVIDUAL WIT
UWO	0000000067	Training Society of ROLA	Training Society of ROLA	EXTERNAL INDIVIDUAL/COI
UWO	0000000068	Council of Research Western	Council of Research Western	EXTERNAL DEPARTMENT.F
UWO	0000000069	Frans Foundation	Frans Foundation	FRAN'S PROGRAM FOR HIS
UWO	0000000070	CANADIAN ROLA TRAINING FOUNDATION	CANADIAN ROLA TRAINING FOUNDATION	EXTERNAL INDIVIDUAL WIT

Click OK.

You will be returned to the *Extend Access* screen.
Save these changes/additions.



Once you have granted an individual access, a message will be sent via email to the individual with instructions to acknowledge the access granted in *ROLA*.

In this example a user was given access to Maintain Proposal for ALL, and you can see now that they are listed in the **Proposal** on the resources tab as “Authorized”.

The screenshot displays the UWO Financials interface. On the left is a navigation menu with options like 'My Favorites', 'UWO Menu', 'Grants (ROLA II)', 'Sponsored Research', 'Proposals', 'Maintain Proposal', 'Authorization & Access', 'Reporting Tools', 'PeopleTools', and 'My Personalizations'. The main content area shows proposal details for Proposal ID 0000000360, Business Unit UWO, and PI Name Hale, Jasper. Below this is a 'Professional' resources table with columns for Number, Employee ID, Name, Role, Department, and % Effort. The table lists Hale, Jasper as PI and Swani, Isabella as Authorized. A red circle highlights the 'Authorized' status for Swani, Isabella.

UWO Financials

Home Add to

General Info Details Projects Resources Location Certification Key Words

Proposal ID: 0000000360 Business Unit: UWO PI Name: Hale, Jasper
Version ID: V1 Total Budget: 0.00
Title: Electronics of Engines

Please select Employee ID to add Western resources (e.g. CO-PI) for this project.
Non-Western CO-PIs may be added as "CO-PI Ext". See Help for details.
Effort represents % of researcher time for this project.

Proposal Project ID: 0010000540 Electronics of Engines Project Budget: 0.000

Number	Employee ID	Name	Role	Department	% Effort
10	*****	Hale, Jasper	PI	260400	100.00
20	*****	Swani, Isabella	Authorized		