EGMS Groups

Groups

Groups are a way of establishing access to a users proposal information in the EGMS system. Three of the EGMS databases (proposal preparation, expertise, and other support) all use groups slightly differently. The groups must be established in each database individually by the user. The purpose of groups is to give others within your department or area of expertise access to view or update the proposal information you have entered into EGMS.

Proposal Preparation Database

The groups established in the proposal preparation database indicate who can view and who can update the proposal information. A user can set up a separate group for each proposal they have or use the same group on all proposals. Consider the following when setting up groups in the proposal database:

- Anyone who will be preparing a portion of the proposal will need update access.
- The department accountant/administrator will need update access to complete the budget.
- Co-PIs may need update access, but should have view access at a minimum.

To grant access:
1. Access the proposal preparation database in EGMS via the home page.
2. Click on <Group Properties> at the top of the main screen.
3. Create your initial group by typing the X.500 address of the person you want to have access in the blank box and indicate the type of access (update or view) in the drop down list next to the box.
4. Repeat step 3 for everyone you want to have access to this group in the proposal database.
5. Click <Update Group>.

To create a new group, other than the initial group, click <Create New Group> at the top of the screen and repeat the process outlined above.

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<th>Group Owner</th>
<th>Who has access</th>
<th>What level of access</th>
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Expertise Database

The group established in the expertise database will have update capability to your expertise information. Only one group per user is allowed in this database, and everyone in the group has update capabilities. Generally, the user and possibly an assistant are the only ones who will need access to the user’s expertise information.

To grant access:
1. Access the expertise database in EGMS via the home page (or the link from the proposal database).
2. Create your group by typing the X.500 address of the person you want to have access in the blank box.
3. Repeat step 2 for everyone you want to have access to your expertise group.
4. Click <Update Group>.

Hint: Think about who you (the expertise record owner) will allow access to update your record.

Other Support Database

The group established in the other support database will have update capability to your other support information. Only one group per user is allowed in this database, and everyone in the group has update capabilities. Generally, the user and possibly an assistant are the only ones who will need access to the user’s other support information.

To grant access:
1. Access the other support database in EGMS via the home page (or the link from the proposal database).
2. Create your group by typing the X.500 address of the person you want to have access in the blank box.
3. Repeat step 2 for everyone you want to have access to your other support group.
4. Click <Update Group>.

Hint: Think about who you (the other support record owner) will allow access to update your record.