

Overview:

Kuali Coeus (KC) allows two users to access the same Proposal Development record at once but they must be in different locations: Proposal or Budget. If you try to enter a section that is being modified by another user, you will receive a message that the proposal/budget has a lock. You must wait to enter that particular section until the other user has closed out of the record.

 **Note:** Before you delete a lock on a proposal/budget, be sure that the browser window with the record has not been minimized on your desktop; if you delete a lock on a proposal/budget that is already open, you could lose any unsaved data in that record.

Occasionally, you may inadvertently lock a proposal/budget that you are editing while you are in the record or if you exit KC without properly closing the Proposal Development record. Locks can also occur when there is a disconnection between the user's computer and KC. The disconnection can be caused by a computer crash, a network glitch/failure, or a server issue.

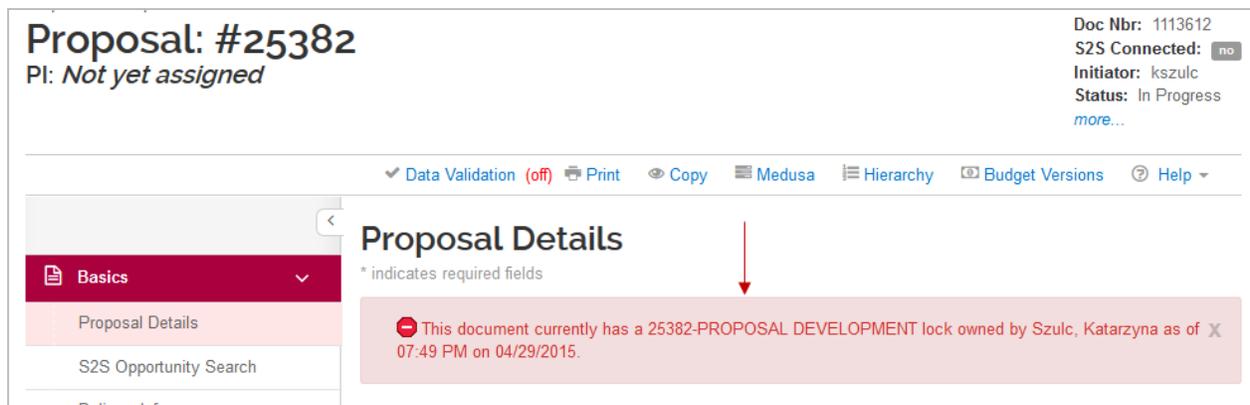
KC allows you to delete locks on a proposal/budget (unlock a proposal/budget) that you, yourself, have locked. If a different user has locked the proposal/budget, he/she may be working on it at that time. If another user has it locked, but is *not* currently editing the proposal/budget, you can ask him/her to unlock the record for you or you can contact the KC Support Team for assistance.



Note: KC refers to these locks as *Pessimistic Locks*.

Procedure:
Deleting Pessimistic Lock (Unlocking Proposal)

1. On occasions, when you click the **edit** link to modify a proposal, the proposal will display in **view mode** only and you receive a message that states that the proposal has a lock.



The screenshot shows the Kuali Coeus interface for Proposal #25382. The proposal is in 'view mode'. A red banner message at the bottom of the 'Proposal Details' section indicates a lock: 'This document currently has a 25382-PROPOSAL DEVELOPMENT lock owned by Szulc, Katarzyna as of 07:49 PM on 04/29/2015.' A red arrow points to this message. The interface includes a navigation menu on the left with 'Basics' selected, and a top toolbar with options like 'Data Validation (off)', 'Print', 'Copy', 'Medusa', 'Hierarchy', 'Budget Versions', and 'Help'.

Figure 1 – Proposal Lock Message



Note: The message will state who the lock owner is. If the lock owner is you, then you can proceed with the steps below to delete the lock. If a lock owner is someone else, he/she may be working on the proposal/budget at that time. If another user has it locked, but is **not** currently editing the record, you can ask him/her to unlock it for you or you can contact the KC Support Team for assistance.

- To unlock the selected proposal/budget, navigate to the KC **Home** screen.
- In the **Quick Links** menu group, click the [view more...](#) link

The screenshot shows the Kuali Coeus Home screen. At the top, there is a navigation bar with 'HOME', 'DASHBOARD', and 'SYSTEM ADMIN PORTAL'. Below the navigation bar, there is a search bar and a 'Search Tasks' section. The main content area is divided into 'Browse Tasks' and 'Quick Links'. The 'Quick Links' section is highlighted in yellow, and a red arrow points to the 'view more...' link.

Figure 2 – View More...

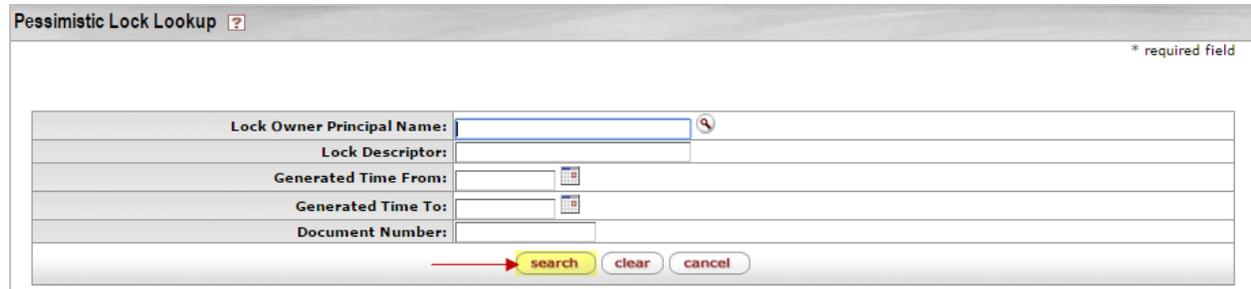
- After clicking the [view more...](#) link, the **Quick Links** menu group displays additional options. From those options, click the **View Pessimistic Lock (Locked Records)** link.

The screenshot shows the Kuali Coeus Quick Links menu. The 'Quick Links' section is highlighted in yellow, and a red arrow points to the 'View Pessimistic Lock (Locked Records)' link.

Figure 3 – View Pessimistic Lock (Locked Records)

- In the **Pessimistic Lock Lookup** window that opens, enter desired search criteria and click the **search** button. Alternatively, you can leave the search criteria fields blank and just click the **search** button alone.

 **Note:** In the **Lock Descriptor** field you can enter the **Proposal Number**, with * at the beginning and end of the number (e.g. ***25382***), of the proposal/budget you want to unlock to only display that record. A blank search, on the other hand, will display all locks that you have access to delete.



Pessimistic Lock Lookup * required field

Lock Owner Principal Name:

Lock Descriptor:

Generated Time From:

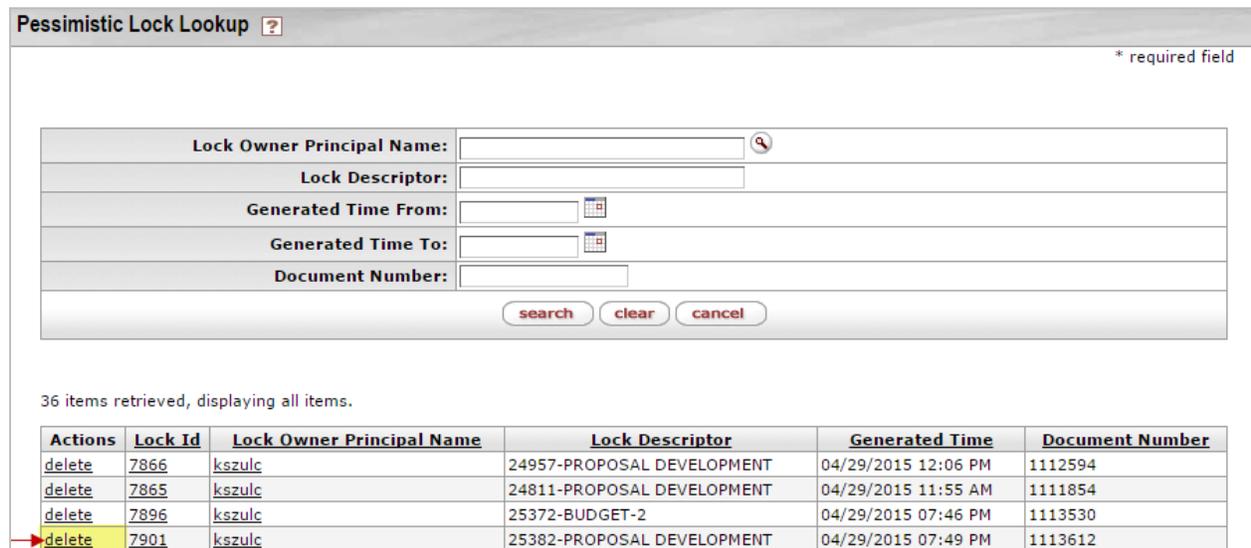
Generated Time To:

Document Number:

search **clear** **cancel**

Figure 4 – Pessimistic Lock Lookup Window

- From the search results displayed at the bottom of the screen, select the lock that you want to delete and click the **delete** link in the **Actions** column corresponding to the selected lock.



Pessimistic Lock Lookup * required field

Lock Owner Principal Name:

Lock Descriptor:

Generated Time From:

Generated Time To:

Document Number:

search **clear** **cancel**

36 items retrieved, displaying all items.

| Actions | Lock Id | Lock Owner Principal Name | Lock Descriptor | Generated Time | Document Number |
|------------------------|---------|---------------------------|----------------------------|---------------------|-----------------|
| delete | 7866 | kszulc | 24957-PROPOSAL DEVELOPMENT | 04/29/2015 12:06 PM | 1112594 |
| delete | 7865 | kszulc | 24811-PROPOSAL DEVELOPMENT | 04/29/2015 11:55 AM | 1111854 |
| delete | 7896 | kszulc | 25372-BUDGET-2 | 04/29/2015 07:46 PM | 1113530 |
| delete | 7901 | kszulc | 25382-PROPOSAL DEVELOPMENT | 04/29/2015 07:49 PM | 1113612 |

Figure 5 – Deleting Lock

You will be returned to the KC **Home** screen. The lock on the record has been deleted and you can now access it in edit mode.

 **Note:** Only one lock can be deleted at a time. These steps will need to be repeated to delete each individual lock.

Getting Help

For questions or problems using Quali Coeus Deleting Pessimistic Locks Quick Reference Card, email the Support Team at kc-help@mit.edu.

Include your **Name**, **Contact Information**, and the **questions** you have and/or **difficulties** you are experiencing.