Help Guide - Selecting a Delegate & Assigning Permissions

Contents

What is a Delegate?

A delegate is someone you can specifically designate to view your messages and assignments in InfoEd. A delegate can also be set up to take actions on your behalf, such as updating records you have access to or reviewing routed items and making approval or disapproval decisions on routed items.
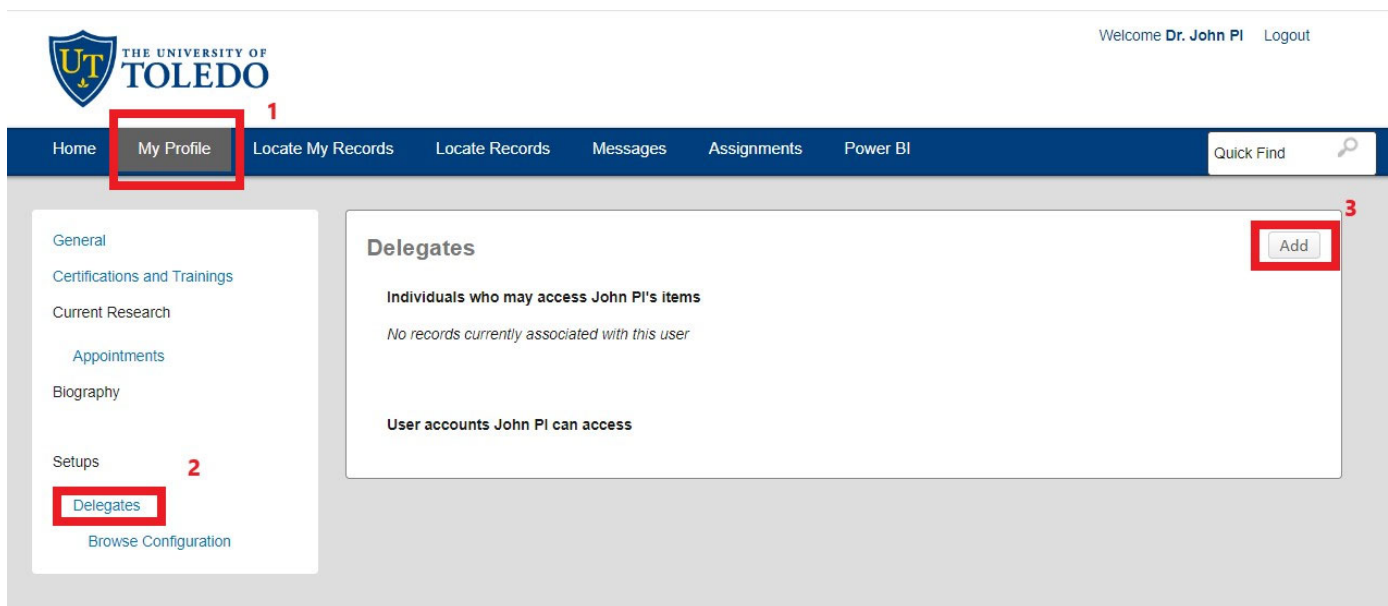
Logging into Infoed

Access InfoEd at https://infoed.utoledo.edu.
This will take you to the Tower login page.
Log in using your UTAD username and password.

Adding a New Delegate Who Can See Messages & Assignments

1. Click My Profile.
2. In the left menu, under Setups, click Delegates.
3. Click Add in the upper right corner. This will bring up the following window:

Create Delegate [Save] [Cancel]

* Indicates A Mandatory Field

* Name [   ]

Messages ○ Show ○ Hide   Work Queue ○ Show ○ Hide   Calendar View ☐ Edit ☐ Add
                                                                        ☐ Delete ☐

4. Start typing the name of the person in the Name box and select the person as the list filters down.
5. Decide whether you want the person to see any Messages sent to you and select Show/Hide as appropriate.
6. Decide whether you want the person to be able to see any tasks in the Work Queue assigned to you and select Show/Hide as appropriate.
7. Ignore Calendar View as this functionality is not currently used.

Create Delegate [Save] [Cancel]

* Indicates A Mandatory Field

* Name [Coinvestigator, Joe - Test M]

Messages ◉ Show ○ Hide   Work Queue ◉ Show ○ Hide   Calendar View ☐ Edit ☐ Add
                                                                        ☐ Delete ☐

8. When finished, click Save in the upper right corner. This will add the person to the list of people who can see your messages and work assignments. To empower your delegate to act on your behalf, refer to the next section.

Assigning Permissions to a Delegate to Act on Your Behalf

Delegates [Add]

Individuals who may access John PI's items

1 Items Page 1 of 1

Name	Department	Messages	Work Queue	View	Edit	Add	Delete	
Coinvestigator, Joe	Test MC Department	View	View	No	No	No	No	Delete

User accounts John PI can access

1. Click on the name of the person in your delegates list. This will open the next screen, shown below:

Edit Delegate [Save] [Cancel]

* Indicates A Mandatory Field

* Name   Coinvestigator, Joe - Test M

Messages ⦿ Show ◯ Hide   Work Queue ⦿ Show ◯ Hide   Calendar View ☐ Edit ☐ Add ☐ Delete ☐

Joe Coinvestigator's access to your information

[Add]

Module	Record Access	Screen Level Access	Signing Authority (Routing)	Complete Action Items	Batch Communications	Routing	CC: on emails Action Items	Exclude Board Agenda/Minutes Messages	Exclude Reviewer Assignments and Messages

2. Click Add to the right of the access list. This will open the next screen shown below:

Add [Cancel] [Select]

To select multiple modules to associate, press and hold CTRL (for Windows) or Command (for Mac) and click the desired modules

Agreements
Conflict of Interest
Entities
Post Award Management
Proposal Development
Proposal Tracking
Subawards

3. Following the instructions at the top of the screen above, select the Modules you want your delegate to be able to act in (typically Proposal Development and Proposal Tracking). Then click Select in the upper right corner. This will open the screen shown below:

4. For each module, decide if you would like your delegate to have Edit or View access and select the appropriate radio button. Then click on each checkbox for each permission you would like your delegate to have.

*Note: A delegate who can act in all the same capacities as yourself would be set up like this (see below):

5. Once you have selected your preferred permissions and functions for your delegate, click Save in the upper right corner of the screen.

To Modify Permissions for an Existing Delegate

1. Click on the name of the person in your delegates list for whom you would like to modify access. This will open the next screen shown below:

2. Select or Unselect the Edit and View radio buttons and the function checkboxes to change your delegate's current access and permissions.
3. When you are done, click Save in the upper right corner.

To Remove a Delegate

1. Click the Delete link to the right of the name of the person you wish to remove.
2. Nothing else is needed to remove a delegate.