Delegating InfoEd Record Access and Approval Authority

In InfoEd, one has the ability to allow others to access their records. This is referred to as record delegation. One can delegate authority to others so that they may view and/or edit records. In addition, signature authority may also be delegated so that one may perform an approval on behalf of another. This document details the use of delegation and how to set and remove delegates.

Use of Delegation

Delegation of access can be useful for a variety of reasons. For example, an investigator may delegate proposal access to another person who may be preparing proposal materials. Or, a chair who is involved in approving proposals and plans an absence may delegate proposal approval authority to someone else during the period of absence. In short, delegation allows others access to records to which they would otherwise not have access, or it allows one to act on behalf of another.

Setting and Removing Delegates

Setting and removing delegates is a relatively easy process that is accomplished in one’s profile. To access one’s profile, navigate to the My Profile tab and click Edit.

Once the profile has been accessed, there will be a series of navigation links on the right area of the screen. Click on Delegates to open the delegates screen.
To add a delegate click [Add].

Next, select the desired delegate from the personnel directory. To locate a person, click on the letter of their last name and either find them in the drop-down list or begin entering their last name in the “Search for a particular entry box” until the correct name appears. Once the desired name is located, click [Select].

Once the delegate has been added, the access can then be configured for edit or view as well as signing authority. Edit access will allow the delegate to edit records. View access will allow one to only view records. Signing authority will allow one to perform proposal approvals on someone else’s behalf. There are other permissions that can be granted as well. To remove access, simply return to the Delegates screen and click the arrow in the Remove column.