Add Delegates to View or Edit a Principal Investigator’s Protocol

This help document is related to the My Profile and the Animal Use / IACUC module or Animal Facilities / CC Module in the UConn Health InfoEd Electronic Research Administration (eRA) portal. It informs users and principal investigators (PI) how to delegate access to their protocols so that another InfoEd user who is not listed as a member of their research key personnel on a protocol can access and/or edit that protocol. The other user whom access is being delegated to must already have access to the InfoEd system before they can be delegated access to protocols.

1. Once logged into the UConn Health InfoEd portal at https://uchealth.infoed.uconn.edu, click My Profile in the main navigation bar area.

2. Scroll down so that the bottom of the left navigation bar menu appears and you see Setups. Click Delegates hyperlink under Setups.

3. On My Profile > Delegates page, click the Add button to add a delegate. A modal window appears to Create a Delegate.

4. In the Name field, type in a person’s Lastname, Firstname that you wish to delegate access to.

5. Select the person from the list being mindful of the person’s middle initial and department as some names are quite common across UConn and UConn Health. Choose the desired person to provide access to your protocol.

6. Select Show or Hide Messages (i.e. email like messages sent through the system) and Work Queue (task assignments/to do list items) radio buttons. Most won’t use the Calendar in InfoEd in favor of MS Outlook so providing access is unnecessary.

7. Click Save button on the top of the Create Delegate modal window. The person’s name is added to the Delegates screen, however you have not yet provided any access to any modules.
8. **Click** the person’s **Last Name, First Name** from the Delegates page to edit their permissions.

9. **Click Add button** to add the module(s) for the delegate to access. Delegates are assigned on a module by module basis and different rights can be granted to the same person for different modules. A new modal window appears to choose the appropriate modules. Rights are the same for all protocols within the module, there is no individual protocol specific delegation available within InfoEd.

10. **Chose one or more modules.** To select multiple modules at once, press and hold CTRL (for Windows) or Command (for Mac) and click the desired modules. Lab Animals is the Animal Use / IACUC protocols system. Animal Facilities Management provides overall access to that module but you must also select the individual components to grant access for example to Facility Management Orders (or Census) to allow non-protocol staff to view or edit the Animal Order piece of that system.

11. Press the **Select** button. If you wish to provide for example, access to your Animal Use Protocol and also the Animal Facilities Protocol with Ordering, you would need to choose all three modules (Lab animal, Animal Facilities, and Facility Management Orders).

12. Set the appropriate permissions for each level of delegation: record access, signing authority, batch communications, routing and action items/assignments.

   a. **Record Access – View** allows them to view the record. **Edit** would allow them, where applicable, to edit the record and for IACUC protocols, create new submissions.

   b. **Signing Authority (Routing)** – Allows the delegate to submit, review and sign off to approve protocols. Remember delegating access does not delegate your responsibility. Also make sure the person has the Show Messages and Show Work Queue radio buttons selected.

   c. **Complete Action Items** when checked will give the delegate the ability to complete Task Assignments / Action Items assigned to you. Also make sure the person has the Show Work Queue radio button selected.

   d. **Batch Communications** when checked would give the delegate user the ability to receive CC: emails on InfoEd messages related to the protocol for batch communications (e.g. determination letters, records of expiration, reminder letters)
e. Routing when checked would give the delegate user the ability to received CC: emails for routing messages related to internal review and approval.

f. Action items when checked would give the delegate user the ability to receive CC: emails on action items/to do list task assignments if for example a protocol or order was returned for modification.

13. Click **Save** Button on the top of the Edit Delegate modal window.

14. The Delegates page updates and shows the new user and their access as a delegate.

**To Edit or Review Permissions Including Delete:**

15. **Click** on the **User’s Last, First Name** on the Delegates screen to open the modal window showing their permissions.

16. The **Delete** hyperlink removes the person as a delegate for All modules that they may have been granted rights too. To edit a specific module, click the person’s Last Name, First Name hyperlink to adjust their permissions such as removing a module that is no longer needed.

17. Clicking on the **Delete** hyperlink next to a module removes all access to that module for that user.