To: Deans, Director and Department Chairs with Sponsored Project Proposal Approval Responsibilities  
From: Jennifer Gagnon, Associate Vice President of Research Administration  
Date: October 10, 2014  
Re: New Delegation Features in InfoEd for Proposal Routing and Approvals

I am writing to let you know about a new delegation feature in InfoEd that will be useful in the proposal review process.  

**For Deans, Director, Department Chairs**  
Deans, Directors and Department Chairs may now assign delegates to help with proposal review and approvals.  

1. Delegates can be assigned to automatically receive a carbon copy of the proposal review/approval emails that are sent to Deans, Directors and Department Chairs.  
2. Delegates can also be given authority to approve proposals on behalf of the Deans, Directors and Department Chairs.  

With the old delegation features, delegates received automatic FYI emails and their names appeared in the route, which created some slowness within the system and confusion about roles. With this new feature, we have been able to preserve the notifications while eliminating the names from the route.

For Deans, Directors and Department Chairs, there is no need to adjust your delegate selections, unless you wish to make a change to current assignments.

**For Investigators**  
Investigators may also assign delegates to help with proposal development and document uploads. This is not a new feature, but is now more granular in that an Investigator can now assign a delegate for to a specific InfoEd module and with specific rights.

For example, a delegate can be assigned to the Proposal Development system but not to the Proposal Tracking System. This would allow the delegate to help with proposal uploads and forms, but would not allow the delegate access to proposal tracking history.

For Investigators, there is no need to adjust your delegate selections, unless you wish to make a change to current assignments.

If you wish to change delegates for proposal routing  
1. Open the Delegation page on the SPA/InfoEd web site at [https://www.uvm.edu/~infoed/?Page=delegates.html](https://www.uvm.edu/~infoed/?Page=delegates.html)  
2. Click the “Delegates – proposal routing” link to see routing delegates for Deans, Directors and Department Chairs  
3. Determine who (if anyone) should receive a carbon copy on the proposal routing/approval emails you receive.  
4. Decide who (if anyone) should have “signing authority” to review and approve proposals on your behalf as Dean, Director of Department Chair.  
5. Contact Catherine.Ruley@uvm.edu or at 656-5560 in SPA for help updating your delegate list and delegate options.  
6. Or, follow the instructions on the Delegation page to make those selections yourself. [https://www.uvm.edu/~infoed/?Page=delegates.html](https://www.uvm.edu/~infoed/?Page=delegates.html)

**The Review Dashboard “FYI Steps” have been eliminated**  
SPA has removed the below list of “FYI” steps which were previously “hard coded” into the route. Administrators can now be informed via the delegation features described above.