

Human Capital Management: Step-by-Step Guide

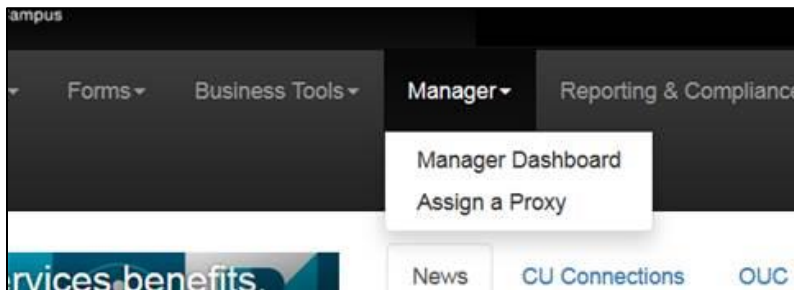
My Leave: Supervisor Adding a Proxy (formerly designate)

This guide demonstrates how a supervisor can assign a proxy (formerly known as a designate) in My Leave and other approval functions using SMART forms in HCM. A proxy can be assigned to a specific transaction type or to all. Supervisors must set the proxy themselves.

This guide begins with steps for adding one proxy for all transactions, and then shows how to add one or several different proxies to individual transactions.

Note: If a proxy has been established, only the proxy will receive the timesheet and leave requests, not the supervisor.

Navigation: From your Manager dashboard in the portal, click **Assign a Proxy**.



The Proxy page appears.

1. Click the **Add a New Value** tab if the proxy is being established for the first time. You must know the User ID of the proxy.

Assign Proxy User

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

User ID

Case Sensitive

2. Select the lookup (magnifying glass) next to **Alternate User ID**.

Assign Proxy User Clear setup

User ID: SICA000006
 Description: Nancy Sicalides-Tucker
 Apply to all

Alternate User ID:

Effective Date From:
 Effective Date To: Apply for all transactions

Proxy User Preferences						
Transaction	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy	
1 CULeaveApproval	<input type="text"/> <input type="button" value="🔍"/>		<input type="text"/> <input type="button" value="📅"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="checkbox"/>	
2 CUPETAApproval	<input type="text"/> <input type="button" value="🔍"/>		<input type="text"/> <input type="button" value="📅"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="checkbox"/>	
3 CUTimesheetApproval	<input type="text"/> <input type="button" value="🔍"/>		<input type="text"/> <input type="button" value="📅"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="checkbox"/>	
4 ePARApproval	<input type="text"/> <input type="button" value="🔍"/>		<input type="text"/> <input type="button" value="📅"/>	<input type="text"/> <input type="button" value="📅"/>	<input type="checkbox"/>	

3. Search for the employee who will be the proxy.

Note: The User ID is different from an employee ID. If you are uncertain of the User ID of the employee you will be assigning as the proxy, in the Description list box select **contains** from the drop-down and enter the proxy's last name and press **Enter**.

Look Up Alternate User ID Help

User ID begins with

Description contains

Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

User ID	Description
SHAD000099	Brynn Ashley Shader
ALLM000013	Shader, Kathleen Allman

4. To add the proxy, click the person's name.

Look Up Alternate User ID Help

User ID begins with

Description contains

Basic Lookup

Search Results

View 100 First 1-2 of 2 Last

User ID	Description
SHAD000099	Brynn Ashley Shader
ALLM000013	Shader, Kathleen Allman

5. Select the timeframe you would like the proxy to perform approvals and click **Apply for all transactions**.

Alternate User ID: SICA000006 Sicalides-Tucker, Nancy

Effective Date From: 11012015
 Effective Date To: 12312025 Apply for all transactions

You will now see the Proxy User Preferences updated with your selected Proxy and timeframes.

Proxy User Preferences						
Transaction	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy	
1 CULeaveApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	12/31/2016	<input type="checkbox"/>	
2 CUPETApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	12/31/2016	<input type="checkbox"/>	
3 CUTimesheetApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	12/31/2016	<input type="checkbox"/>	
4 ePARApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	12/31/2016	<input type="checkbox"/>	

6. Click **Save** to finish.

Apply to Individual Transactions

1. Repeat steps 2-6 including filling out **Effective Date From** and **Effective Date To** for each transaction.

Proxy User Preferences						
Transaction	Alternate User ID	Description	Effective Date From	Effective Date To	Disable Proxy	
1 CULeaveApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	02/29/2016	<input type="checkbox"/>	
2 CUPETApproval	BORR000094	Borrego, Trista Marie	01/01/2016	03/31/2016	<input type="checkbox"/>	
3 CUTimesheetApproval	KENT000144	Kent, Melissa	01/01/2016	04/15/2016	<input type="checkbox"/>	
4 ePARApproval	GRUD000010	Grudle, Joshua Adam	01/01/2016	01/31/2016	<input type="checkbox"/>	

- 2.
3. Click **Save**.

Remove a Proxy Before the End of the Scheduled Effective Date

To remove a proxy before the end date that was originally set.

1. Navigation: **Main Menu > Smart Solutions > Smart Workflow > User Preferences > Assign Proxy**.
2. Click **Disable Proxy** and click **Save**.

Note: HCM runs a security process four times a day that picks up the proxy settings; therefore, the person you saved as the proxy may not have immediate access through the portal.