Setting a Proxy in Workflow

## When you need assistance or are unable to access Workflow

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Why set a proxy?

- Set a proxy when you need assistance or are unable to access Workflow for a period of time

- A proxy is able to approve study plans in your absence

- A proxy does not receive email notices so will need to check their worklist

- A proxy should only be set in extreme circumstances

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How to Set a Proxy
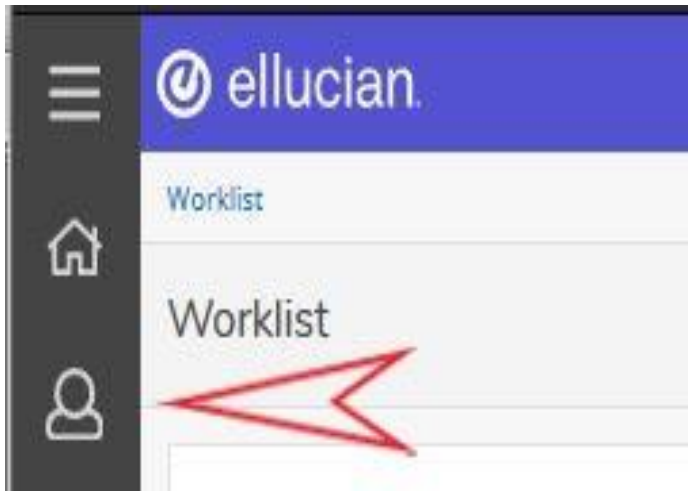
- Select User Information on the User profile menu on the left side of your worklist
- Click on Add Proxy next to the role you want to add a proxy for in the My Roles Section of the User Information page
- Select the individual you wish to assign
- Add the effective dates
- Click Save
- You have completed setting a proxy

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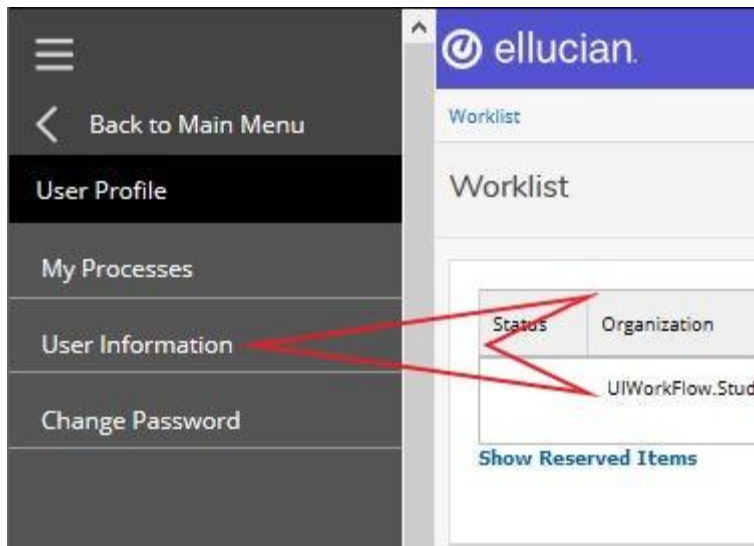
My Roles Section

My Roles

Organization	Role Name	Effective From	Effective To	Type	Proxy Assignment
UIWorkFlow	Academic Advisor	02-Apr-2012 10:38:14 AM		Primary	Add Proxy
UIWorkFlow	Role Review	28-Jan-2019 03:25:10 PM		Primary	Add Proxy
UIWorkFlow.Student	Academic Advisor	05-Apr-2012 08:50:49 AM		Primary	Add Proxy
UIWorkFlow.Student	Change of Major	08-Sep-2017 02:13:55 PM		Primary	Add Proxy
UIWorkFlow.Student	College Rep	16-Aug-2012 02:47:37 PM		Primary	Add Proxy
UIWorkFlow.Student	Role Review	30-Sep-2019 02:01:27 PM		Primary	Add Proxy

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Assign a Proxy

Proxy Details

Organization - RoleName: UIWorkFlow.Student - Change of Major

[icon] Save   ↺ Reset

User:

charless

Effective From:

04-Dec-2019 04:30:22 PM

[calendar] [clock]

Effective To:

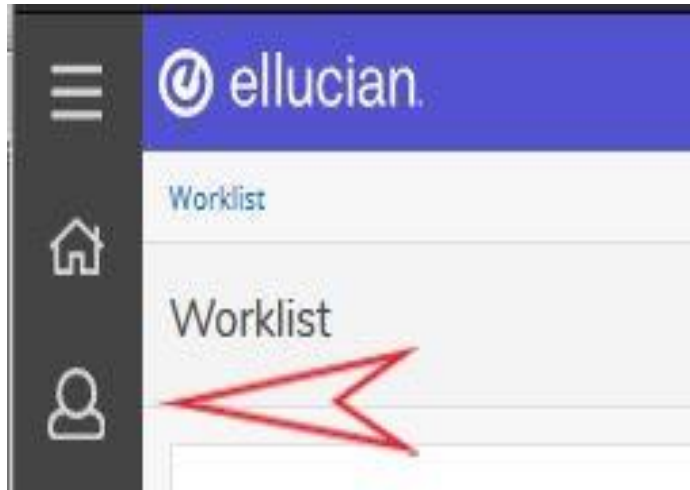31-Dec-2019

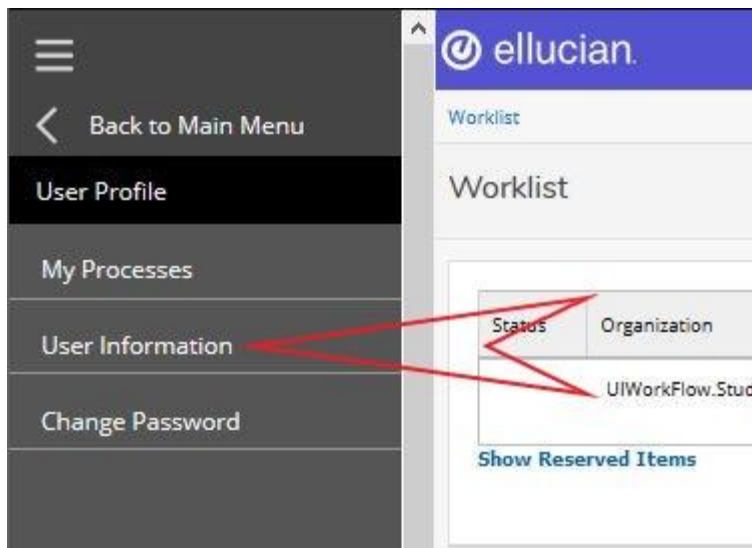[calendar] [clock]

☑ Confidential
☑ Non-Confidential
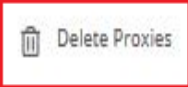
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Deleting a Proxy

- Select User Information on the User profile menu on the left side of your worklist

- Under Proxy Assignments check the box next to the user you wish to delete

- Click Delete Proxies button

- You have successfully deleted a proxy

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Deleting a Proxy

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