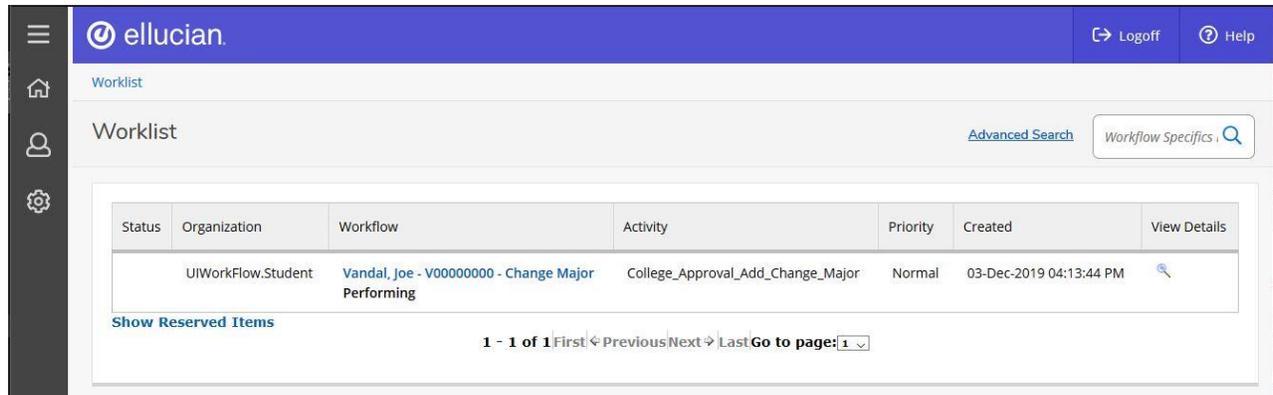


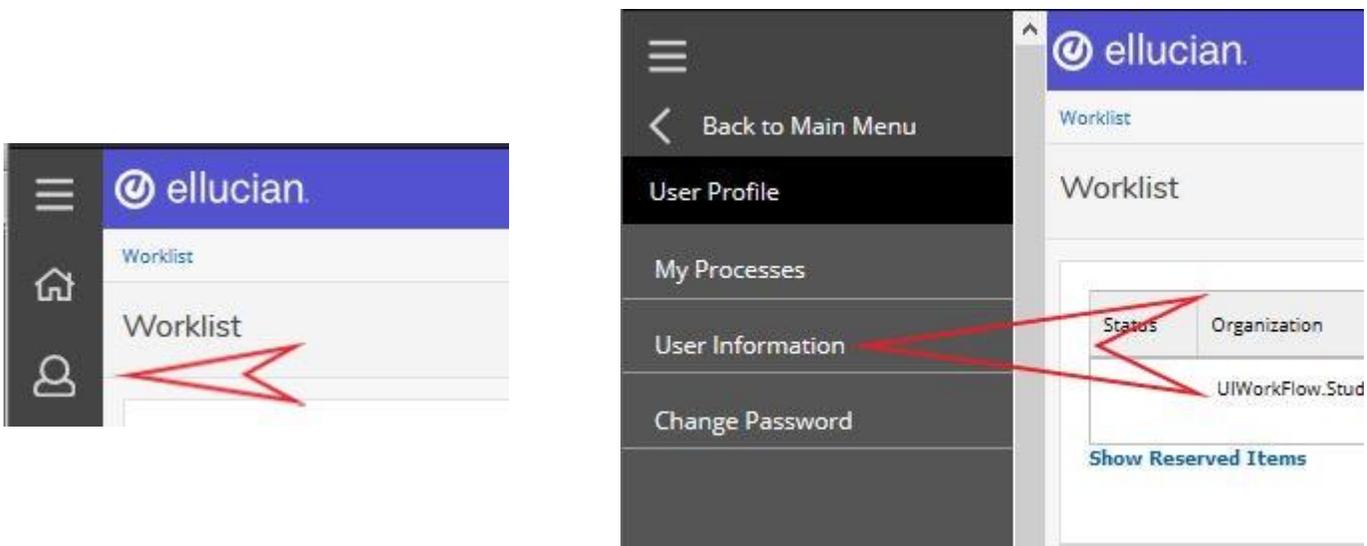
## Assigning a Proxy for the Electronic Approval Process

Proxies are designed to be temporary assignments only. Proxies will not receive email notifications for new or pending items. They will need to check their worklist channel on a regular basis. Proxy assignments will automatically expire on the “Effective To” date that is designated and access can only be renewed by the original user.

1. Log into Banner Workflow at <https://bannerwf.uidaho.edu:7787/wfprod>. Workflow takes advantage of the University of Idaho’s Single Sign On (SSO) system. If you are already logged into one of the University’s other SSO services, VandalWeb for example, you will automatically be taken to your Worklist. If you are not logged into another University SSO service, you will be prompted to log in through our SSO system. Information about logging in can be found on the ITS help page: [What will Cloud Authentication look like?](#)
2. After logging in to Workflow you will see your worklist



3. In the left-hand menu click on the *User Profile* icon, then select the *User Information* option



4. Under **My Roles** select *Add Proxy* option next to the role you want to setup a proxy for

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

5. On the **Proxy Details** screen
- Select the correct username from the dropdown list. (You will need to know the username for the person you want to serve as your proxy)
  - Select both an “Effective From” and “Effective To” date; proxies are temporary assignments only, therefore a date range must be selected.
  - Check both the “Confidential” and “Non-Confidential” boxes
  - Click the **Save** button.

User Information · Proxy Details

### Proxy Details

Organization - RoleName: UIWorkflow.Student - Change of Major

User:  
charless

Effective From:  
04-Dec-2019 04:30:22 PM

Effective To:  
31-Dec-2019

Confidential  
 Non-Confidential