# 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**.
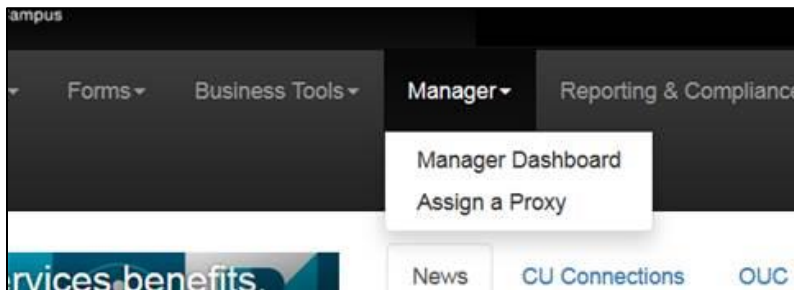
The Proxy page appears.

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.

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

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**.

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

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

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

Proxy User Preferences			Personalize | Find | View All | 🔲 | 📇 View %1 ◄ 1-4 of 4 ► Last		
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 📅	☐
2 CUPETApproval	GRUD000010 🔍	Grudle, Joshua Adam	01/01/2016 📅	12/31/2016 📅	☐
3 CUTimesheetApproval	GRUD000010 🔍	Grudle, Joshua Adam	01/01/2016 📅	12/31/2016 📅	☐
4 ePARApproval	GRUD000010 🔍	Grudle, Joshua Adam	01/01/2016 📅	12/31/2016 📅	☐

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			Personalize | Find | View All | 🔲 | 📇 View %1 ◄ 1-4 of 4 ► Last		
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 📅	☐
2 CUPETApproval	BORR000094 🔍	Borrego, Trista Marie	01/01/2016 📅	03/31/2016 📅	☐
3 CUTimesheetApproval	KENT000144 🔍	Kent, Melissa	01/01/2016 📅	04/15/2016 📅	☐
4 ePARApproval	GRUD000010 🔍	Grudle, Joshua Adam	01/01/2016 📅	01/31/2016 📅	☐

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.