



How to Assign a Proxy

Click on the “Self” icon on the home page.

Self

Statewide Announcement COVID-19 and DES Training offered at 1500 Jefferson. [Click Here to Learn More.](#) x

Good Morning! 📧

ANNOUNCEMENTS

View the latest statewide announcements below.

- COVID-19 and DES Training offered at 1500 Jefferson
- Just Another Announcement

ANNOUNCEMENTS

MY TRAINING

Navigate to the learning dashboard where you can resume courses, see progress and access new training as soon as it's available.

DASHBOARD

MY TRANSCRIPT

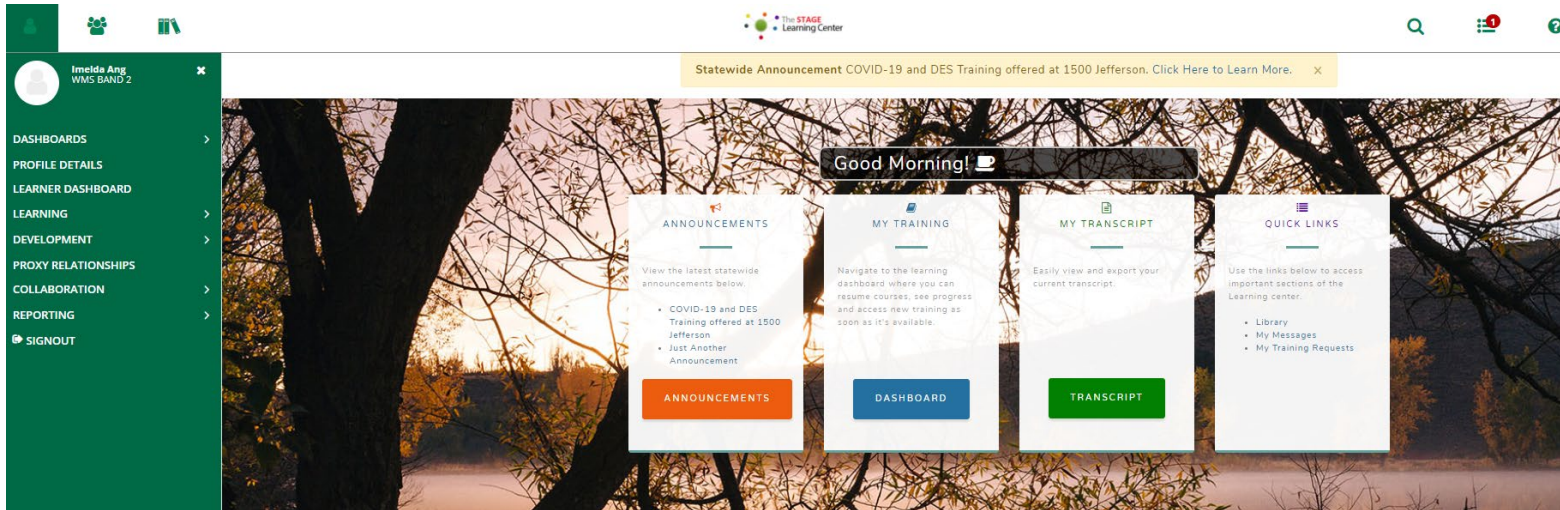
Easily view and export your current transcript.

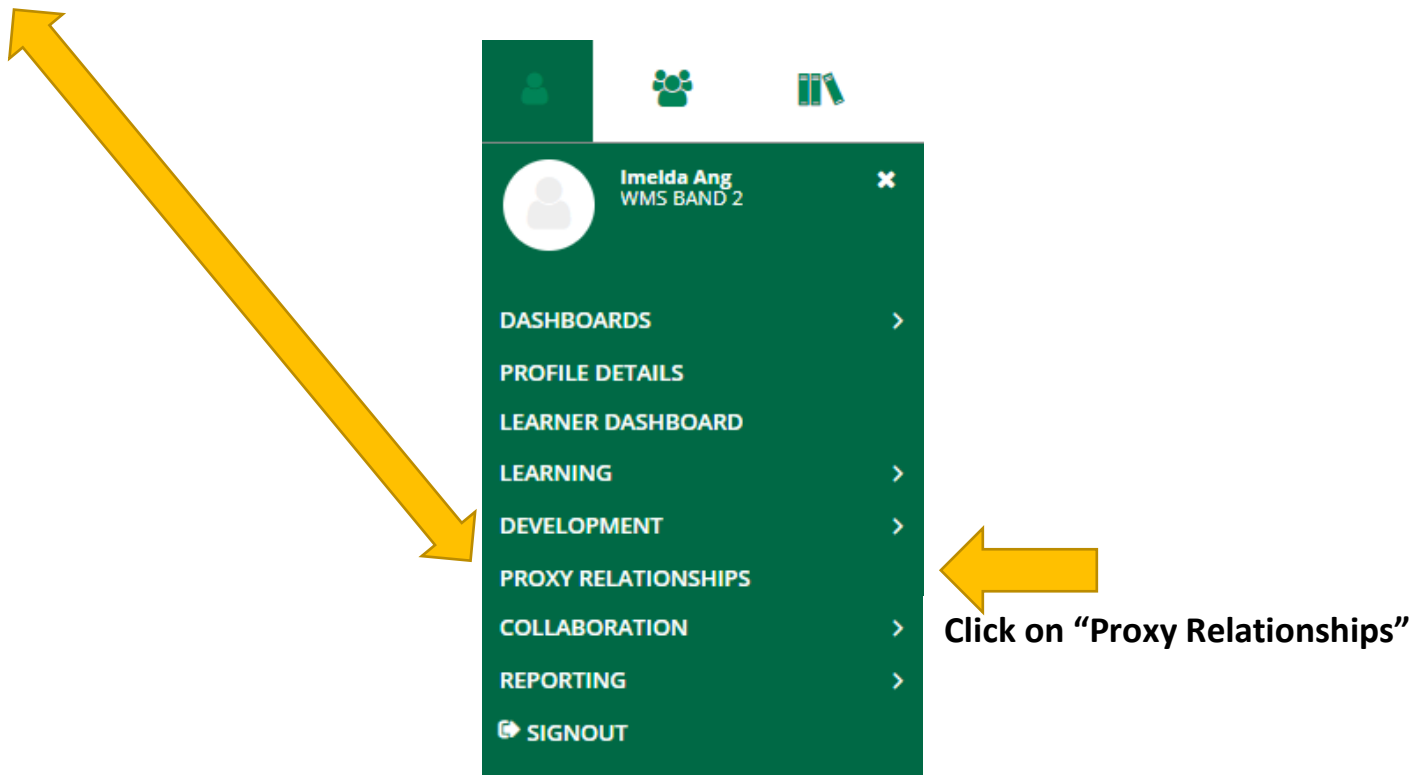
TRANSCRIPT

QUICK LINKS

- Library
- My Messages
- My Training Requests

After clicking the “Self” icon, you will be provided an expanded menu.





After clicking on "Proxy Relationships," you will be directed to the page below.

The screenshot shows the 'PROXY RELATIONSHIPS' page. At the top, there is a search bar and a 'SEARCH' button. Below the search bar, there are three tabs: 'MY PROXIES', 'MANAGERS I CAN PROXY FOR', and 'VIEWABLE USERS'. The 'MY PROXIES' tab is selected. Below the tabs, there are several action buttons: '+ New', '- Remove', 'Activate', 'Deactivate', 'Print', and 'Export'. Below the action buttons, there is a table with the following columns: 'Name of Proxy', 'Primary Organization', 'User Status', 'Start Date', 'End Date', 'Status', and 'Actions'. The table is currently empty, and the text 'No Results Found' is displayed below it.



PROXY RELATIONSHIPS

Manage those who can act on your behalf. From this page you can: add new proxies, remove existing proxies, as well as activate/deactivate existing proxy relationships.

[MY PROXIES](#) [MANAGERS I CAN PROXY FOR](#) [VIEWABLE USERS](#)

[+ New](#) [- Remove](#) [☐ Activate](#) [⏸ Deactivate](#) [🖨 Print](#) [📄 Export](#)

<input type="checkbox"/>	Name of Proxy ^	Primary Organization ⇅	User Status ⇅
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No Results Found

Click on “New” to start the process of designating a proxy.



PROXY RELATIONSHIPS

Manage those who can act on your behalf. From this page you can: add new proxies, remove existing proxies, as well as activate/deactivate existing proxy relationships.

MY PROXIES [MANAGERS I CAN PROXY FOR](#) [VIEWABLE USERS](#)

+ New **- Remove** **Activate** **Deactivate** **Print** **Export**

<input type="checkbox"/>	Name of Proxy ^	Primary Organization ⇅	User Status ⇅
--------------------------	-----------------	------------------------	---------------

No Results Found



PROXY RELATIONSHIP PROPERTIES

Specify the dates between which you want a proxy to be active. If you want the proxy to be active for an indefinite period, select the Activate Proxy Indefinitely option. Similarly, if you want the proxy to remain inactive for an indefinite period, select the Inactivate Proxy Indefinitely option.

Name of the manager:

Imelda Ang

Name of the proxy:*

BROWSE...

Note: Browse for a user to proxy for the manager name you see above.

Activate Proxy Relationships:

- Activate Proxy Indefinitely
- Inactivate Proxy Indefinitely
- Activate Proxy between

CANCEL SAVE



PROXY RELATIONSHIP PROPERTIES

Specify the dates between which you want a proxy to be active. If you want the proxy to be active for an indefinite period, sel

Name of the manager:

Imelda Ang

Name of the proxy:*

BROWSE...

Note: Browse for a user to proxy for the manager name you see above.

Activate Proxy Relationships:

- Activate Proxy Indefinitely
- Inactivate Proxy Indefinitely
- Activate Proxy between

Take note, the default name listed in the “Name of the manager” field is the manager who is signed on to Learning Center.

Click on the “Browse” button to start the process of assigning the person you want as your proxy.

After clicking on the “Browse” button, a pop up screen will appear.

SumTotal



SELECT A USER

Follow the instructions below to search for a user.

Search: [Help](#)

To find a user account, enter a first or last name in the Search box and click GO.

Depending upon the user identifier column configured, you may be able to also search by user number or e-mail address.

For more information about searching, click the Help link located near the Search box.

CANCEL

Type in the search box the name of the person you want to assign as your proxy.

Press ENTER on your keyboard or click on the magnifying glass.

SumTotal ×

SELECT A USER

Follow the instructions below to search for a user.

Search: [Help](#)



To find a user account, enter a first or last name in the Search box and click GO.

Depending upon the user identifier column configured, you may be able to also search by user number or e-mail address.

For more information about searching, click the Help link located near the Search box.


CANCEL

After pressing the ENTER key or clicking on the magnifying glass, the screen will refresh and will load the name of the person you searched for.

SumTotal x

SELECT A USER

Select one user from the list below and click OK.

Search: [Help](#) 

Records: 1

Name	Username
<input type="radio"/> Kelly LYN Hillman	00507801

Click on the radio button next to the name.

Click on “OK”

After clicking on the “OK” button, you will be directed back to the “Proxy Relationship Properties.”

The screenshot shows the top navigation bar with icons for user, group, and document, the STAGE Learning Center logo, and search, notification, and help icons. The main content area is titled "PROXY RELATIONSHIP PROPERTIES" and includes a descriptive paragraph. Below this are two input fields: "Name of the manager:" with the value "Imelda Ang" and "Name of the proxy:*" with the value "Kelly LYN Hillman". A "BROWSE..." button is positioned to the right of the second field. A note below the fields reads: "Note: Browse for a user to proxy for the manager name you see above." Underneath, there are three radio button options: "Activate Proxy Indefinitely" (selected), "Inactivate Proxy Indefinitely", and "Activate Proxy between". At the bottom right, there are "CANCEL" and "SAVE" buttons.

This is another view of the "PROXY RELATIONSHIP PROPERTIES" form. It features the same title and introductory text. The "Name of the manager:" field contains "Imelda Ang" and the "Name of the proxy:*" field contains "Kelly LYN Hillman". A note below the fields states: "Note: Browse for a user to proxy for the manager name you see above." The "Activate Proxy Relationships:" section shows three radio button options: "Activate Proxy Indefinitely" (selected), "Inactivate Proxy Indefinitely", and "Activate Proxy between".

Before you click “Save,” choose from the options below to select the parameters of the proxy.

- Activity Proxy Relationships
- Inactivate Proxy Indefinitely
- Activate Proxy between

The default setting is the first option.

Typically, proxies are set for a specific period of time and the manager will most likely use the “Activate Proxy between.”

PROXY RELATIONSHIP PROPERTIES

Specify the dates between which you want a proxy to be active. If you want the proxy to b

Name of the manager:

Imelda Ang

Name of the proxy:*

Kelly LYN Hillman

Note: Browse for a user to proxy for the manager name you see above.

Activate Proxy Relationships:

- Activate Proxy Indefinitely
- Inactivate Proxy Indefinitely
- Activate Proxy between

Start date:*

09/14/2020 12:00pm

End date:*

09/25/2020 12:00pm

September 2020						
Su	Mo	Tu	We	Th	Fr	Sa
		X	X	X	X	X
X	X	X	X	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

12 : 00 pm
Sep 21, 2020 Clear X

Select "Activate Proxy between

Select Start and End dates.


After you are finished selecting the dates, click "SAVE" on the right side of the screen.

After clicking on the “SAVE” button, you will be directed back to the “Proxy Relationships” page.

You can now view the proxy you assigned and the duration of the proxy.

PROXY RELATIONSHIPS

Manage those who can act on your behalf. From this page you can: add new proxies, remove existing proxies, as well as activate/deactivate existing proxy relationships.

The proxy has been added. 

Search ...

[MY PROXIES](#) [MANAGERS I CAN PROXY FOR](#) [VIEWABLE USERS](#)

[+ New](#) [- Remove](#) [☑ Activate](#) [⏏ Deactivate](#) [🖨 Print](#) [📄 Export](#)

<input type="checkbox"/>	Name of Proxy ^	Primary Organization ▾	User Status ▾	Start Date ▾	End Date ▾	Status ▾	Actions
<input type="checkbox"/>	Kelly Hillman	L&J HUMAN RES ILD		9/14/2020	9/25/2020	Active	<input type="button" value="EDIT"/>

REMOVE A PROXY

Click on the name of the person you want to cancel the proxy on the “Proxy Relationships” page.

Click on “Remove” from the list of actions on the menu.

PROXY RELATIONSHIPS

Manage those who can act on your behalf. From this page you can: add new proxies, remove existing proxie



The proxy has been added.

Search ... **SEARCH**

MY PROXIES MANAGERS I CAN PROXY FOR VIEWABLE USERS

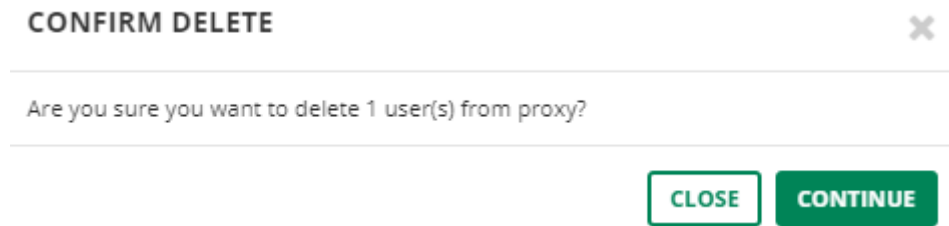
+ New - Remove Activate Deactivate Print Export

<input type="checkbox"/>	Name of Proxy ^	Primary Organization ⇅
<input type="checkbox"/>	Kelly Hillman	L&I HUMAN RES ILD

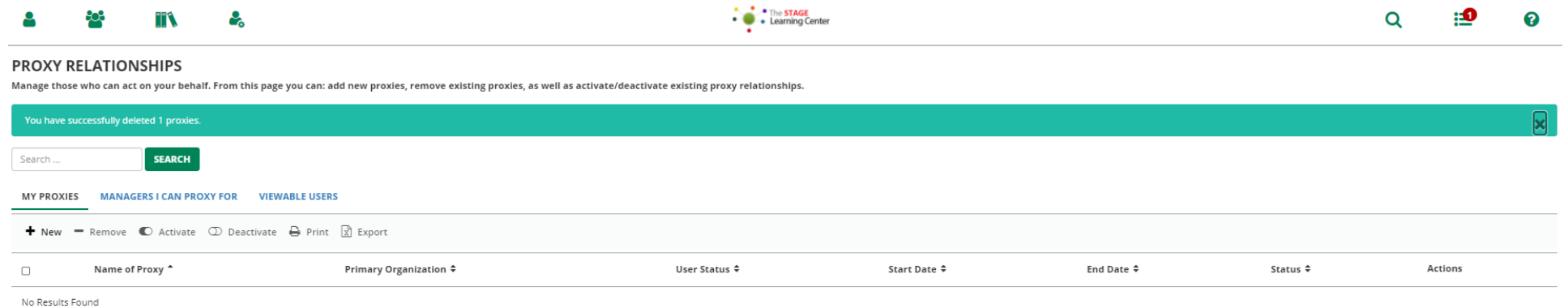


After clicking on “Remove” you will be directed to a pop up screen.

Click on the “CONTINUE” button.



After clicking on the “CONTINUE” button you will be directed back to the “Proxy Relationships” page where you can verify your proxy has been removed.



Date Changed	Revisions	Changed By	Revision #
09/21/20	Created	Imelda	1