Managing Proxy for Performance

Guide for Administrators

Overview
As HR Administrators in your school or unit, this guide will help you:

- Establish a proxy for a staff member or supervisor within myHR Learn.

Notes:
- A proxy can read and write as a substitute for another person within the system.
- Actions taken by proxies are recorded as such within a system audit trail.
- Proxies are typically set for a defined period of time.
- As an admin, you cannot set yourself as proxy. Another administrator, your HRBP, or HRITS can assist you. More detail below.

Prepare
Login to myHR Learn at learn.northwestern.edu. From the Home page, click ADMIN along the purple menu bar.

Set proxy within myHR Learn
1. On the white sub-menu, click PEOPLE, and on the left sidebar, MANAGE PEOPLE.

2. Your page should now say “Find Proxy Assignments.” To determine if proxy settings are already in place, enter a name or NetID in either “Proxy For” or “Proxy By.” Click the magnifying glass to select a person and press SEARCH.

3. If proxy does not already exist, under the search area on the right, click on the small link to ADD PROXY.
Your page should now say “Add New Proxy”

4. On the “Add New Proxy” page, type in the name or NetID of the person you wish to assign as proxy for another in the “Proxy By” field.

5. Click the magnifying glass next to their name, and select their NetID and name from the dropdown below. Their NetID will be populated in the “Proxy by” field.

6. Next, click the ADD PROXY TARGETS link on the right side of the “Proxy For” area.

7. A pop-up window will appear. Enter the first and last name of the person for whom the proxy is being designated, and click SEARCH. Check the box next to the person’s name, and click SELECT.

8. The pop-up window will close and you will be back on the “Add New Proxy” page. The name of the person you just selected will be shown under “Proxy For.”

9. Confirm the Start and End Date of the proxy. The system defaults this to one week.

10. Keep the Hierarchy option (default) as “None.”

11. Under “Select roles that the proxy can access,” choose PERFORMANCE.

12. Click SAVE.

Note: if you choose yourself as proxy, you will get an error message at this point.
Designate yourself as proxy within myHR Learn

There may be times when you would like to set yourself as proxy for another user in myHR Learn.

- When a staff member or supervisor is away from the system and requests your help to complete a review.
- When a staff member or supervisor requests your help at any point in the year.

The system prevents setting oneself as proxy for another without involving another administrator. Here are three paths to set oneself as proxy for a staff member or supervisor on a case by case basis:

1. Work with other Administrator(s) in your school or unit to set one another up as proxy as needed.
2. Request help from your HR Business Partner to set up the proxy.
3. Send a request to HRITS via consultant@northwestern.edu and include confirmation from the Proxy target on the email. I.e. “XYZ has requested that I act as their proxy for Performance for the month of March. See their note below confirming this request”