



for admins

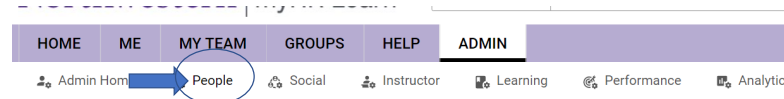
Assign Proxy Access

Performance Excellence Job Aid

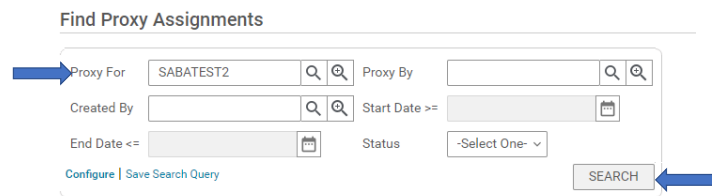
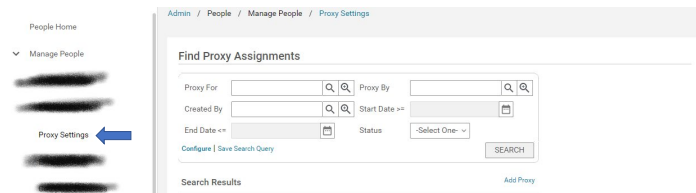
This job aid is for Performance Excellence Administrators, and shows how to assign Proxy Access within in myHR Learn. Proxy access is when one person is assigned access to act as agent for another person. Within Performance, that means that the *proxy* can enter ratings and text into the review form. This may be appropriate when a supervisor will not be accessing the system directly, and chooses a trusted person to act on their behalf. *Notes: direct reports cannot act as proxies for their own supervisors. System audit trails show when content was added via proxy.*

Login to myHR Learn at learn.northwestern.edu

1. From the Home page, click **ADMIN** along the purple menu bar.
2. Click on **PEOPLE** (on sub-menu) and then **MANAGE PEOPLE**. Click **PROXY SETTINGS**



3. Your page will now say “Find Proxy Assignments.” To determine if active 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**.



Search Results [Add Proxy](#) | [Print](#) | [Export](#) | [Modify Table](#)

Proxy For	Proxy By	Start Date	End Date	Status	Actions
Saba Test2	[REDACTED]	07-JAN-2021	14-JAN-2021	Terminated	View/Edit
Saba Test2	[REDACTED]	10-MAR-2021	17-MAR-2021	Terminated	View/Edit

4. If an active proxy assignment does not already exist, click on the small link to **ADD PROXY** (under the search area on the right).

Find Proxy Assignments

Proxy For: SABATEST2 Proxy By:

Created By: Start Date >=:

End Date <=: Status: -Select One-

[Configure](#) | [Save Search Query](#)

Search Results

[Add Proxy](#) | [Print](#) | [Export](#) | [Modify Table](#)

Proxy For	Proxy By	Start Date	End Date	Status	Actions
Saba Test2	[Redacted]	07-JAN-2021	14-JAN-2021	Terminated	View/Edit
Saba Test2	[Redacted]	10-MAR-2021	17-MAR-2021	Terminated	View/Edit

5. You will now see “Add New Proxy.” Enter the name or NetID of the person you wish to assign as proxy for another in “Proxy By.” This is the person who will acting as agent in the system. 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.

Add New Proxy

Proxy By*:

Start Date*: 22-FEB-2022

End Date*: 01-MAR-2022

[Click here](#) to see the list of people for whom "Proxy By" is acting as a proxy.

Proxy For: [Add Proxy Targets](#)

No items found

Select roles that the proxy can access

- Home
- Team Dashboard
- Learning
- Ecommerce
- Social
- People
- HR
- Instructor
- Performance
- System

6. Select **ADD PROXY TARGETS** on the right side of the page.

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**.

Search Person, Internal

First Name: Last Name:

Person ID: Username: sabatest2

Manager: Organization:

Location: Domain:

Person Type: -Select One- Include All Suborganizations:

People [Print](#) | [Export](#)

<input type="checkbox"/>	First Name	Last Name	Username	Person Type	Person ID	Organization	Location	Manager
<input checked="" type="checkbox"/>	Saba	Test2	SABATEST2	Staff	1234321	044500 - Office of Human Resources	Evanston	[Redacted]

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.”

Add New Proxy

Proxy By * [Name] [Search]

Start Date * 22-FEB-2022 [Calendar]

End Date * 01-MAR-2022 [Calendar]

[Click here](#) to see the list of people for whom "Proxy By" is acting as a proxy.

Proxy For [Add Proxy Targets](#)

Name	Hierarchy Option	Actions
Saba Test2		[Trash]

Select roles that the proxy can access

- Home
- Team Dashboard
- Learning
- Ecommerce
- Social
- People
- HR
- Instructor
- Performance
- System

SAVE CANCEL

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

Proxy By * [Name] [Search]

Start Date * 22-FEB-2022 [Calendar]

End Date * 01-MAR-2022 [Calendar]

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

Proxy For [Add Proxy Targets](#)

Name	Hierarchy Option	Actions
Saba Test2		[Trash]

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

Proxy For [Add Proxy Targets](#)

Name	Hierarchy Option	Actions
Saba Test2		[Trash]

Select roles that the proxy can access

- Home
- Team Dashboard
- Learning
- Ecommerce
- Social
- People
- HR
- Instructor
- Performance
- System

SAVE CANCEL

12. Click **SAVE**. Note: if you assign yourself as proxy, you will get an error message.

Add New Proxy

Proxy By * [Name] [Search]

Start Date * 22-FEB-2022 [Calendar]

End Date * 01-MAR-2022 [Calendar]

[Click here](#) to see the list of people for whom "Proxy By" is acting as a proxy.

Proxy For [Add Proxy Targets](#)

Name	Hierarchy Option	Actions
Saba Test2		[Trash]

Select roles that the proxy can access

- Home
- Team Dashboard
- Learning
- Ecommerce
- Social
- People
- HR
- Instructor
- Performance
- System

SAVE CANCEL

Assigning yourself proxy within myHR Learn

There may be times when you would like to assign yourself proxy access for another user in myHR Learn. 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 assign each other as proxy.
2. Request help from your HR Business Partner to assign 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"

Ready to login? learn.northwestern.edu Access additional tools and resources: perform.northwestern.edu

Help: For policy and process questions, contact your unit's HR Administrator. For technical support: 847-491-4357 (1-HELP) or consultant@northwestern.edu