Proxy

Overview
Proxy is a feature of the Performance platform that allows users to designate other users to submit, approve, present, or report on recognition activity on their behalf. Proxy allows for impactful recognition to continue when participants are out of the office or working on certain initiatives that keep them occupied and unable to act in a timely manner.

Designator Experience
Assigning a Proxy

If a user has the permissions to designate a Proxy assignment, they will begin by logging into their Recognition Site, the user will then go to the My Account tab, and click on the My Profile link.

My Profile page – A section named “Activities You Have Designated Others To Handle” will be available at the bottom of the My Profile page. Click on “Add New Assignment”.

Proxy user search – A search field will appear to allow the user to search for the individual they would like to designate as a Proxy. They can simply start typing the name of the person they would like to have as their proxy.
Delegate Activates – After the designator has selected their proxy the following page will appear.

- The **Start Date** will automatically populate with today’s date.
- An **End Date** can be selected, or can be left blank if they would like the designee to be their Proxy indefinitely.

**Your Proxy**

Thomas Chen, Financial Accounting
test@doctannier.com

**Duration of Proxy Assignment**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/14/2016</td>
<td>(leave blank to make this assignment indefinite)</td>
</tr>
</tbody>
</table>

**Activities to Assign Your Proxy**

- **All Activities** selects all of the Activities and the individual check boxes are grayed out. This means the designator wants the designee to be a proxy for everything that the designator has permissions to designate.
- **Let Me Choose Which Activities** will open up the check boxes for configuration. The designator can configure multiple designees to be their Proxy for different activities during the same time period. The designator cannot designate more than one designee to be a proxy for the same activity at the same time.

After the designator has made a selection, they will click **Submit** to save the configuration. Proxy assignments will stay in Pending status until the Designee accepts/declines the assignment.
**Accepting or Declining Proxy Assignment**

Notifications of a pending Proxy Assignment – An email will be sent to the designee asking them to either Accept or Decline the assignment. Alerts will also be in the designees My Profile.

**Email:**

<table>
<thead>
<tr>
<th>From:</th>
<th><a href="mailto:appreciate@octanner.com">appreciate@octanner.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>To:</td>
<td>Carma Kertamus</td>
</tr>
<tr>
<td>Cc:</td>
<td></td>
</tr>
<tr>
<td>Subject:</td>
<td>Proxy Action Required: Review and accept/decline your Global Recognition proxy responsibilities</td>
</tr>
</tbody>
</table>

**My Account Alert:**

**My Profile:**

<table>
<thead>
<tr>
<th>name</th>
<th>program</th>
<th>activity</th>
<th>status</th>
<th>assignment date range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margaret Riley</td>
<td>Points Program</td>
<td>Approval</td>
<td>Accept Decline</td>
<td>09/19/2016 00:00 MDT</td>
</tr>
<tr>
<td>Margaret Riley</td>
<td>Points Program</td>
<td>Submit Nomination</td>
<td>Accept Decline</td>
<td>09/19/2016 00:00 MDT</td>
</tr>
<tr>
<td>Margaret Riley</td>
<td>Points Program</td>
<td>Send eCard</td>
<td>Accept Decline</td>
<td>09/19/2016 00:00 MDT</td>
</tr>
<tr>
<td>Margaret Riley</td>
<td>Points Program</td>
<td>Presenter</td>
<td>Accept Decline</td>
<td>09/19/2016 00:00 MDT</td>
</tr>
<tr>
<td>Margaret Riley</td>
<td>Points Program</td>
<td>Smarts® Reports</td>
<td>Accept Decline</td>
<td>09/19/2016 00:00 MDT</td>
</tr>
</tbody>
</table>

**Response** – An email will be sent to the designator for each item the designee has either accepted or declined.
Submitting activities on behalf of someone

Once a designee accepts a proxy assignment their experience in the Recognition site changes a little. If they didn’t previously have permissions to submit a nomination and they accept the Proxy Assignment to submit nominations on behalf of someone their Give Menu and Left Navigation on the program will show the ability to nominate.

Give Menu prior to accepting Proxy Assignment:

![Give Menu prior to accepting Proxy Assignment](image)

Give Menu after accepting Proxy Assignment:

![Give Menu after accepting Proxy Assignment](image)
When submitting a nomination or an eCard the designee will be required to select who to send recognition as (self or Proxy Designator).

My Account – The History for the Proxy designee and designator will indicate if the activity was submitted by a Proxy. If the “On Behalf of” or “Sent by Proxy” is left blank then the user actually submitted the activity.

Example of a Proxy designee’s history:

Example of a Proxy designator’s history:
Approvals / Presentations on behalf of someone

Proxy designee assignment to complete Approvals and/or Presentations will have access to the Toolbox, even if they didn’t previously have permissions to see the Toolbox. Pending Proxy Approvals / Presentations will appear in the same area as regular pending Approvals / Presentations.

Proxy Reports access

Proxy designee assigned to Reports will have access to the Toolbox, even if they didn’t previously have permissions to see the Toolbox.

Example of access options prior to accepting Proxy Assignment:

Example of access options after accepting Proxy Assignment:
View of report access for Designee who does not already have report access:

View of report access for Designee who already has report access ("Toolbox" and "Reports" will already be visible):

The user has the option to select whether they want to run reports under their own name/permissions, or they can select to run the reports as a proxy for their designator.