This job aid is for Performance Excellence Administrators, and shows how to assign Proxy Access within 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. In the secondary navigation bar click on **People** and then **Manage People** to reveal a submenu.

3. From the **Manage People** review scroll down to **Proxy Settings**.
4. 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.

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

6. 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 be 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.

7. Select ADD PROXY TARGETS on the right side of the page.
8. 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.

9. 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.”

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

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

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

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

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