

Acting as a Proxy Approver For Attendance Report Approval

The supervisor of an employee who reports leave online may not always be the person who approves that leave. If you have been granted the ability to act as a proxy for someone whether routinely, in case of emergencies or due to scheduled unavailability, follow the instructions below to act in the stead of a colleague.

NOTE: Acting as a Proxy does not limit the other person's ability to continue to approve leave reports. It only allows you to approve items in their queue while acting on their behalf.

1. Log on to the Samford Portal.
2. From here you may either select Banner from the top menu bar
 - a. Then choose Employee
 - i. Select Employee Dashboard
3. Or you can scan down the left side under HR and Payroll and select Employee Dashboard
4. Look to the left under My Activities and click on Approve Leave Report

The screenshot shows the 'Employee Dashboard' for Stewart, Julie A. It includes sections for 'Leave Balances as of 07/22/2019' (Sick Leave in days: 90.00, Vacation in days: 9.00), 'Pay Information', 'Earnings', and 'Taxes'. On the right side, under 'My Activities', there is a button labeled 'Approve Leave Report' which is circled in red.

5. Once at the 'Approvals - Leave Report' screen, select Proxy Super User from the top of the screen

The screenshot shows the 'Approvals - Leave Report' screen. At the top right, there is a dropdown menu with 'Proxy Super User' selected, which is circled in red. Below this, there are filters for 'Leave Report', 'All Departments', '06/01/2019 - 06/30/2019 (2019 MN 106)', and 'All Status except Not Started'. A table lists pending leave reports, with one entry for 'Southern, Benjamin' (ID: 900084341, Organization: S-PRFSH, Ck Distribution-Fac/Staff-Time Clo, 6.00 Days). The table also shows counts for 'Pending - In the Queue' (0), 'In Progress' (0), 'Returned' (0), 'Error' (0), and 'Pending - Approved' (0).

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6. From the Proxy or Super User screen, under 'Act as a Proxy for', choose from the drop down list the name of the person for whom you will be acting as a proxy. **NOTE: If their name is not listed in the drop down menu, they have not added you as a potential proxy. They will need to complete this step before you will be able to assist them. (Refer to the instructions for Adding a Proxy Approver for Attendance Report Approval)**

The screenshot shows the 'Proxy or Super User' interface. At the top right, it says 'You are acting as proxy for Mrs. Julie A. Stewart'. Below this, there are sections for 'Application Selection', 'Act as a Superuser' (with checkboxes for 'Act as Time Entry Approvals Superuser' and 'Act as Leave Report Approvals Superuser'), and 'Act as a Proxy for'. The 'Act as a Proxy for' dropdown menu is highlighted with a red circle, and a red arrow points to the selected name 'Mrs. Julie A. Stewart - (Human Resources)'. Below this is the 'Existing Proxies' section, which includes an 'Add a new proxy' button, a 'Delete proxies' button, and a table with the header 'Employee Name - (Home Organization)' and the text 'No records found'.

7. A message will appear at the top of the form when you are acting as a proxy for someone else.

This screenshot is identical to the previous one, but a red circle highlights the message 'You are acting as proxy for Mrs. Julie A. Stewart' at the top right of the page. A blue button labeled 'Navigate to Time & Leave Approvals application' is visible at the top right of the form area.

8. Select the option at the bottom of the screen to Navigate to Time and Leave Approval.

This screenshot is identical to the previous ones, but a red circle highlights the blue button 'Navigate to Time & Leave Approvals application' at the bottom right of the page.

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9. You should now be able to review, approve or reject leave reports on their behalf. Refer to instructions on Approving Attendance Reports in Self Service.

10. You will need to return to the Proxy Super User page or log out and back in to discontinue acting as a proxy if you need to act as a leave approver based on your supervisory role.

11. Please let us know if you encounter any issues. Thank you!