

Assign or Delete a Proxy

Overview

SuccessFactors gives Org Chiefs the ability to identify other users as delegates, providing them with access to their job requisitions.

Assigning a Proxy is one method of delegation. Org Chiefs may wish to assign one or more Proxies for the purposes of participating in recruiting-related activities (e.g. applicant review, seniority report, interviewing) and/or to act on their behalf. An audit trail in SuccessFactors Recruiting identifies the Proxy who acts on behalf of the Org Chief for recruiting-related activities.

A Proxy receives visibility into all of the Org Chief's job requisitions, and permission to complete recruiting activities in the Talent Pipeline on behalf of the Org Chief, including the offer approval.


Consider the following when assigning a Proxy:

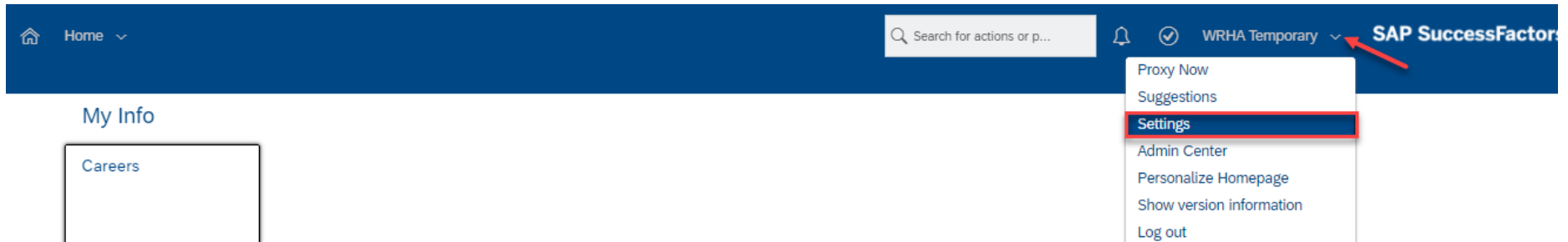
- Email notifications associated with job requisitions are only sent to the Org Chief, not the Proxy. You may want to forward your email notifications to your Proxy.
- A user with proxy rights cannot grant proxy rights on behalf of the user who granted them proxy rights.

Note: Finance, HR Shared Services, and Occupational & Environmental Safety & Health (OESH) users may also use this process to assign other users with proxy rights for the purpose of accessing a generic account. This process must be completed by the generic account owner in the applicable generic account at the following link: <https://hcm17.sapsf.com/login#/login> (use Company ID *winnipegHC* if prompted).

See also the [SuccessFactors Delegation Reference](#) and [Assign a Recruiting Team](#) how-to documents for more information around delegation options.

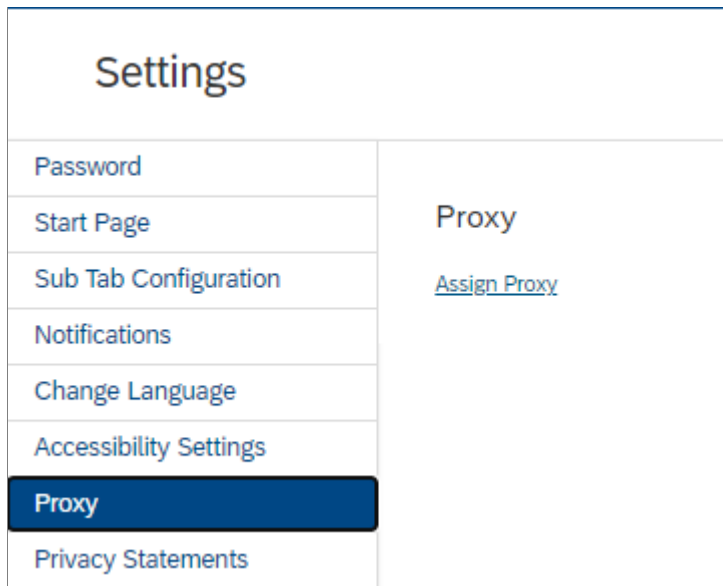
Assign a Proxy

1. Click  in the **user menu** and select **Settings** from the drop-down.



The *Settings* screen appears.

2. Click **Proxy** under the **Settings** menu.
3. Click the **Assign Proxy** link.



The *Proxy* screen appears.

4. Click the **Find User** link.

- If you have the **SuccessFactors username** of the individual you wish to assign proxy rights for, enter it in the **Proxy (username)** field and continue at [Step 9](#). The SuccessFactors username is the same as the individual’s network ID.

Proxy

You currently have no proxy.

Proxy (username): Find User...

Grant Proxy Rights:
Grant rights to the following modules/tabs:

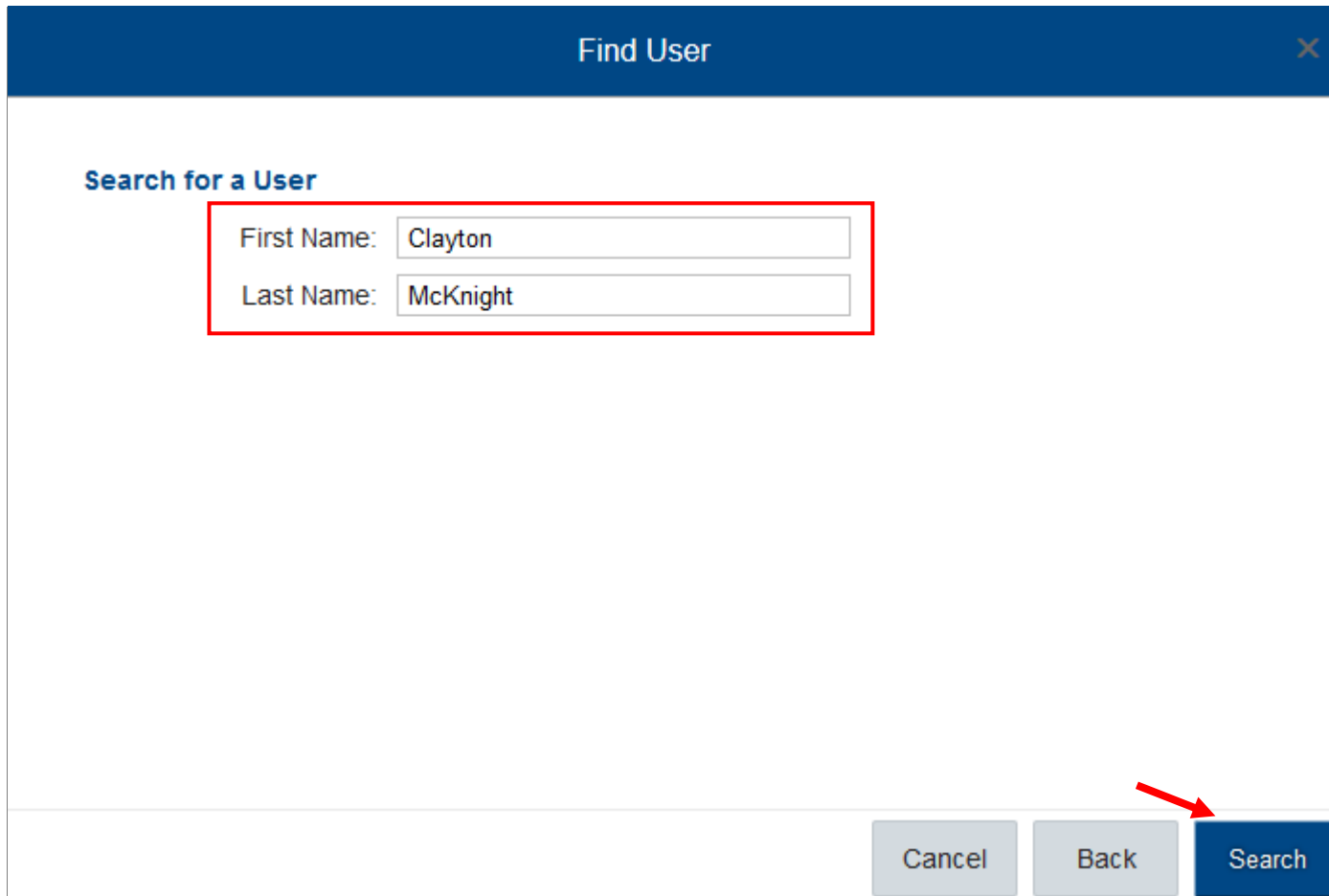
<input type="checkbox"/> Admin Tools	<input type="checkbox"/> Directory	<input type="checkbox"/> Talent Search (standalone)	<input type="checkbox"/> Reports/Dashboards	<input type="checkbox"/> Planning
<input type="checkbox"/> Recruiting	<input type="checkbox"/> Organization chart	<input type="checkbox"/> BPE Task Execution	<input type="checkbox"/> Home Page Tab	<input type="checkbox"/> Options (Mobile)
<input type="checkbox"/> Employee Profile	<input type="checkbox"/> Notes	<input type="checkbox"/> Company resources		

Start: End:

Saving will grant proxy access as per above criteria selection.

The *Find User* pop-up screen appears.

5. Enter the **name of the individual** for whom you wish to assign proxy rights in the **First Name** and/or **Last Name** fields.
6. Click **Search**.



Find User

Search for a User

First Name: Clayton

Last Name: McKnight

Cancel Back Search

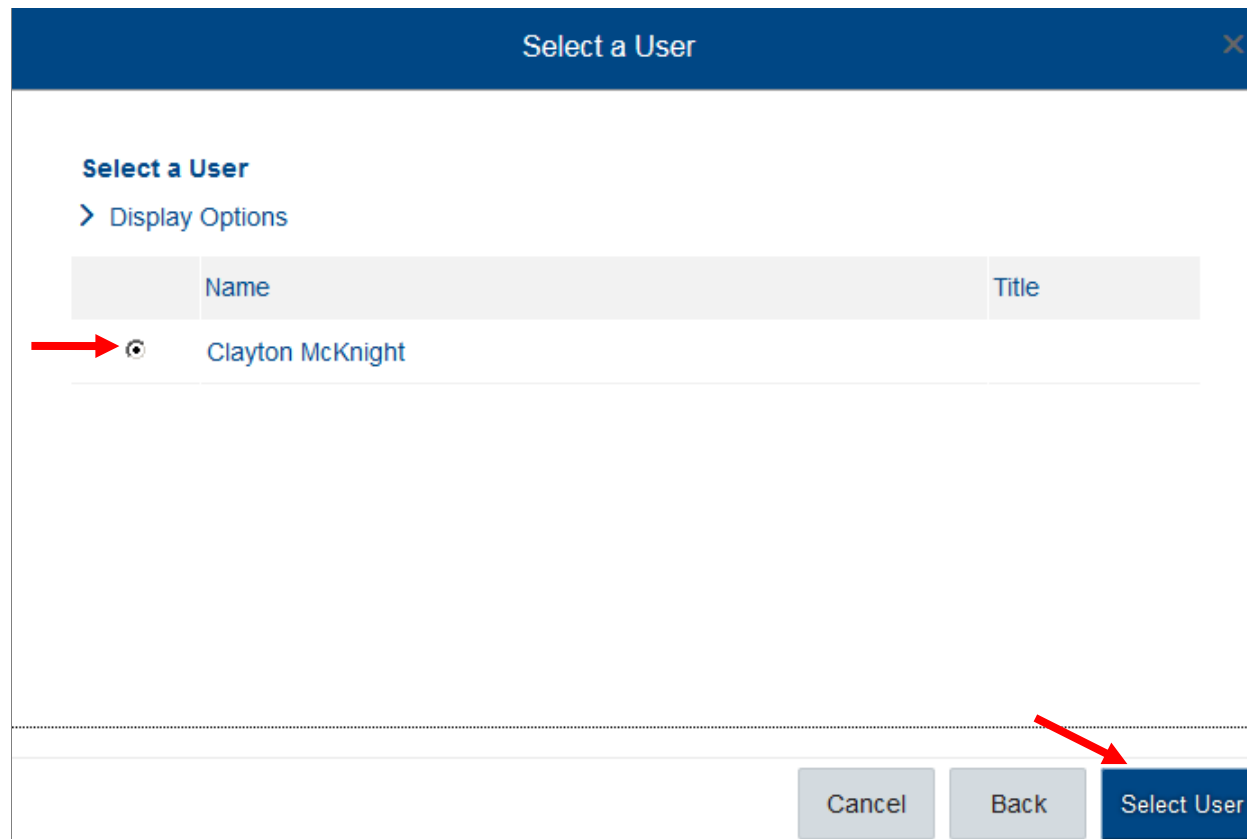
The *Select a User* pop-up screen appears and displays the results of your search.

7. Click the **radio button** beside the name of the **individual you want to assign as a Proxy**.

Note: Depending on the criteria used, your search results may include multiple names. If necessary, scroll through the list of names to locate the applicable individual.

If there are multiple identical names listed in your search results, you will need to obtain the network user ID for the individual you want to assign as a Proxy (e.g. contact the individual or locate the user ID by viewing the individual's email address in Outlook). Once you have the user ID, return to Step 4 and enter it in the *Proxy (username)* field.

8. Click **Select User**.



The screenshot shows a 'Select a User' dialog box. At the top, there is a dark blue header with the text 'Select a User' and a close button (X). Below the header, the text 'Select a User' is displayed, followed by a chevron icon and the text 'Display Options'. A table with two columns, 'Name' and 'Title', is shown. The first row contains the name 'Clayton McKnight'. A red arrow points to a radio button next to the name. At the bottom of the dialog, there are three buttons: 'Cancel', 'Back', and 'Select User'. A red arrow points to the 'Select User' button.

You return to the *Proxy* screen and the name of the user you selected now appears in the Proxy (username) field.

9. Click the checkbox beside each item under the **Grant Proxy Rights** heading that you want to assign to your Proxy. For example, if you want your Proxy to be able to generate seniority reports and participate in recruiting activities, click the checkboxes next to the **Reports/Dashboards** and **Recruiting** items.
10. If applicable, you can select a start date and time and end date and time for the proxy access.
11. Click **Save**.

Proxy

You currently have no proxy.

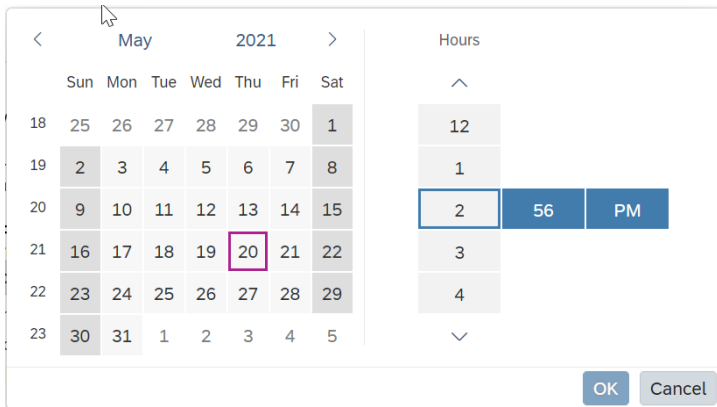
Proxy (username): [Find User...](#)

Grant Proxy Rights:
Grant rights to the following modules/tabs:

<input type="checkbox"/> Admin Tools	<input type="checkbox"/> Directory	<input type="checkbox"/> Talent Search (standalone)	<input checked="" type="checkbox"/> Reports/Dashboards	<input checked="" type="checkbox"/> Planning
<input type="checkbox"/> Recruiting	<input type="checkbox"/> Organization chart	<input type="checkbox"/> BPE Task Execution	<input type="checkbox"/> Home Page Tab	<input type="checkbox"/> Options (Mobile)
<input type="checkbox"/> Employee Profile	<input type="checkbox"/> Notes	<input type="checkbox"/> Company resources		

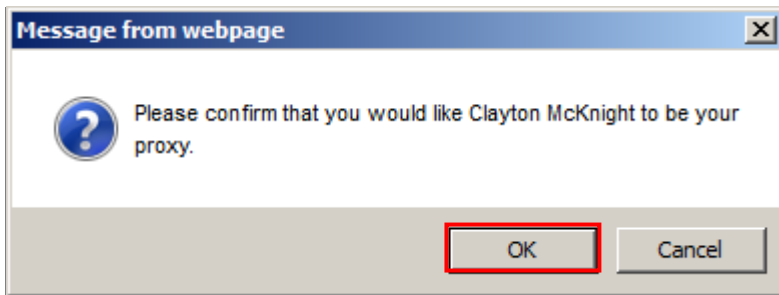
Start: End:

Saving will grant proxy access as per above criteria selection.



A pop-up message appears to confirm the proxy assignment.

12. Click **OK**.



The *Proxy* screen now displays a *Proxy List* section with the name of your Proxy and the corresponding Recruiting rights that you granted. From here you can grant proxy rights to additional users by clicking the **Find User** link.

Proxy

These are your current proxies:

	Full Name	Delete
<input type="radio"/>	Clayton McKnight	

Granted Proxy Rights:

<input type="checkbox"/> All Modules	<input type="checkbox"/> Directory	<input type="checkbox"/> Talent Search (standalone)	<input checked="" type="checkbox"/> Reports/Dashboards	<input checked="" type="checkbox"/> Recruiting
<input type="checkbox"/> Admin Tool	<input type="checkbox"/> BPE Task Execution	<input type="checkbox"/> Home Page Tab	<input type="checkbox"/> Options	<input type="checkbox"/> Employee Profile
<input type="checkbox"/> Organization chart	<input type="checkbox"/> Company resources			
<input type="checkbox"/> Notes				

Add a proxy

Proxy (username): [Find User...](#)

Grant Proxy Rights:
Grant rights to the following modules/tabs:

<input type="checkbox"/> Admin Tool	<input type="checkbox"/> Directory	<input type="checkbox"/> Talent Search (standalone)	<input type="checkbox"/> Reports/Dashboards	<input type="checkbox"/> Recruiting
<input type="checkbox"/> Organization chart	<input type="checkbox"/> BPE Task Execution	<input type="checkbox"/> Home Page Tab	<input type="checkbox"/> Options	<input type="checkbox"/> Employee Profile
<input type="checkbox"/> Notes	<input type="checkbox"/> Company resources			


Saving will grant proxy access as per above criteria selection.

Next Steps

Individuals you assign as a proxy will not receive any notification from SuccessFactors. You must advise the individuals you have granted them proxy rights. The proxy should be advised to complete the required training.

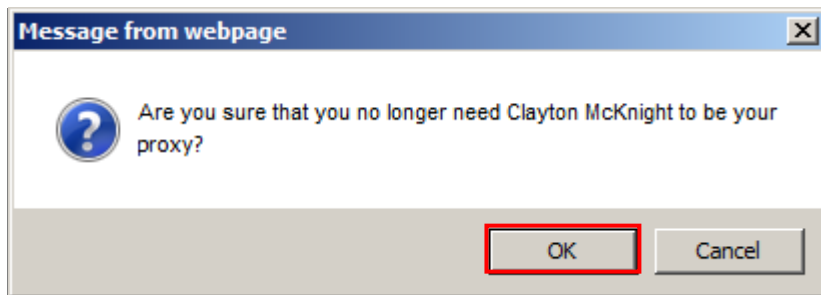
To delete an existing proxy, refer to the [Delete a Proxy](#) section of this document.

Delete a Proxy

1. To delete an existing Proxy,
 - a. Follow steps 1 and 2 in the [Assign a Proxy](#) section.
 - b. Click the radio button beside the name of the Proxy you wish to delete.
 - c. Click  under the Delete column.

A pop-up message appears to confirm the deletion.

2. Click **OK**.



The individual's name is removed from the Proxy List.

Next Steps

Individuals you delete from your proxy list will not receive any notification from SuccessFactors. You may wish to contact the individual(s) to advise that you have deleted their proxy rights.