



## Approver- Add (or Delete) a Proxy to Approve on your behalf

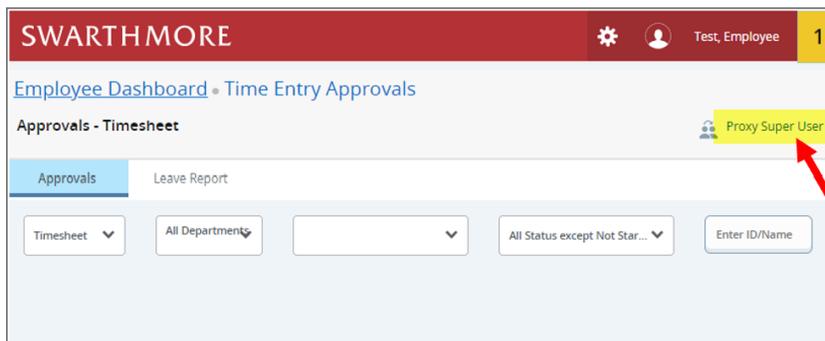
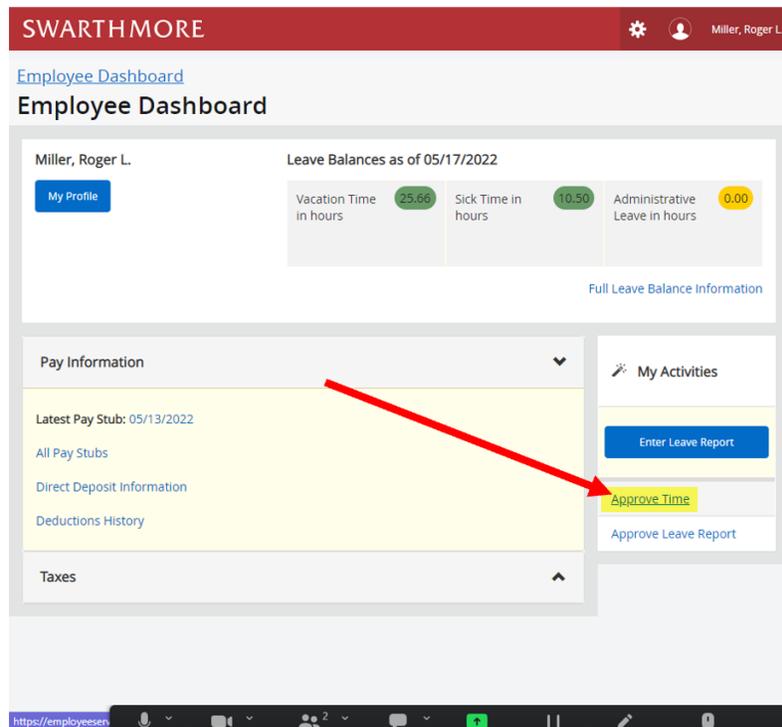
### Add-

All Supervisors should add a proxy to approve time or leave requests when they are unable to in Banner Self Service.

The proxy will have to also have Banner access to view employees in the department(s) they will be approving.

Please contact [payroll@swarthmore.edu](mailto:payroll@swarthmore.edu) to setup or verify their security access, and also take the following steps to assign them as your proxy.

- To add a proxy, click the Approve Time button in the 'My Activities' section of the Employee Dashboard.



- In the Time Entry Approvals window select **Proxy Super User** in the upper right hand corner.



In the Proxy or Super User window, you can add or delete a proxy.

- To add a proxy, click the **Add a New Proxy** button in the 'Existing Proxies' section.

**SWARTHMORE** [Settings] [User: Test, Employee]

[Employee Dashboard](#) • Proxy or Super User

Proxy or Superuser

Application Selection

Time & Leave Approvals ▾

Act as a Superuser

Act as Time Entry Approvals Superuser

Act as Leave Report Approvals Superuser

Act as a Proxy for

Self-Test, Employee - [Human Resources Office] ▾

Existing Proxies

**Add a new proxy** [Delete proxies]

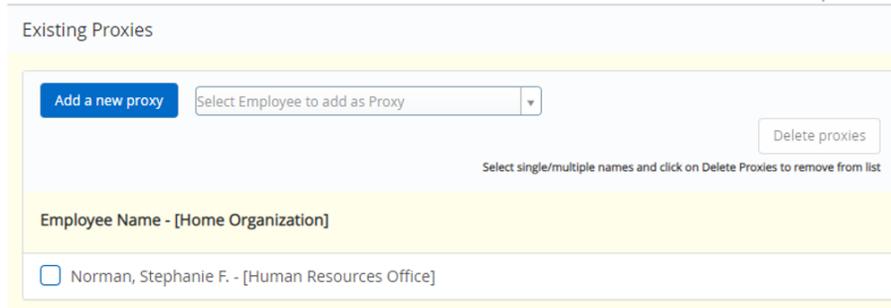
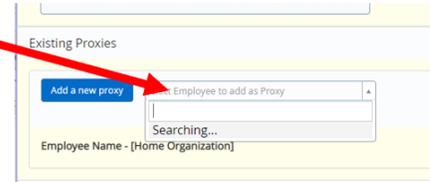
Select single/multiple names and click on Delete Proxies to remove from list

Employee Name - [Home Organization]

No records found



- Search for the name of the employee that you want to appoint as a proxy. Once found, select the employee, and the appointment as a proxy will save.



**Note:** To verify your appointed proxy has appropriate Banner access to see and approve the employees in the desired department, please contact Payroll or HRIS with the department/org number(s) they will be approving.

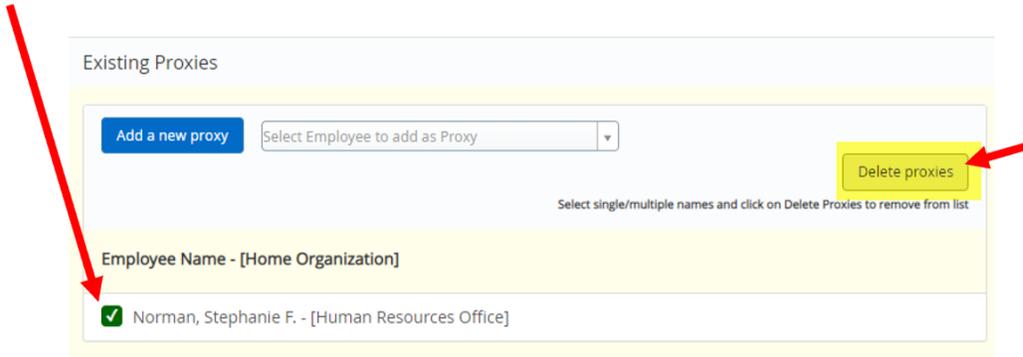
The assigned proxy will have access until you delete the proxy assignment.



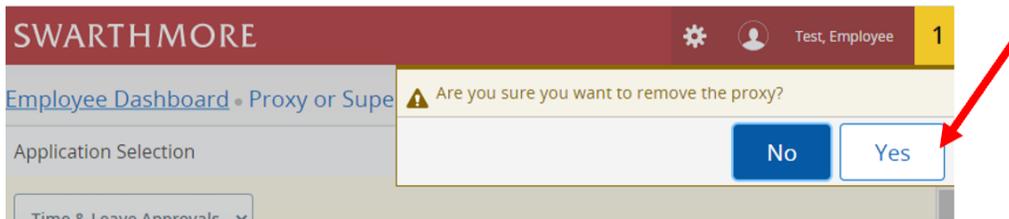
## Delete-

Reminder: Any assigned proxy will have access until you delete their proxy assignment.

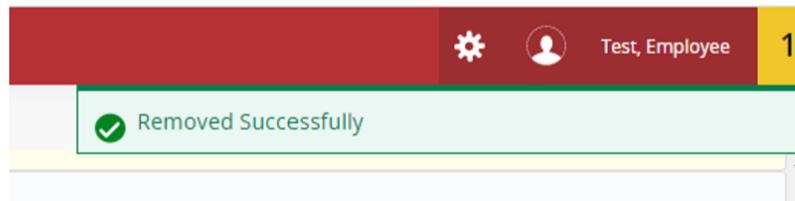
- To delete a proxy, select the check box next to the proxy you want to remove.
- In the right hand corner of the 'Existing Proxies' section, click the Delete Proxies button.



- A confirmation box will pop up to confirm that you want to remove the selected proxy. To continue, click the Yes button.



- Once removed, a confirmation message will appear in the upper right hand corner of the window.





## Proxy- Approve Leave Reports as a Proxy

Once a proxy has been defined, and proper access has been granted by Payroll/HRIS, the proxy can login and act on behalf of that employee

The screenshot shows the MySwarthmore website interface. At the top, there is a red navigation bar with the Swarthmore logo on the left and a user profile icon labeled 'Roger L. Miller' on the right. Below this is a secondary navigation bar with links for 'Main', 'Employee', and 'Finance'. The 'Employee' link is highlighted in yellow. The main content area is titled 'Main Menu' and contains contact information for Faculty, Staff, and Students. Below this is another 'Employee Menu' section, also with 'Employee' highlighted in yellow. This section contains several tiles: 'Employee Dashboard' (with a yellow highlight), 'Annual Notices and Disclosures', 'Benefitfocus Employee Login', 'Bright Horizons', 'Change Home Address with HR', and 'COVID-19 Vaccination Record'. A text box on the right side of the screenshot provides instructions on how to access leave reports as a proxy.

To access Leave Reports and approve as a proxy, from the MySwarthmore landing page, select the 'Employees' menu near the top, and then the 'Employee Dashboard' tile.



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Employee Dashboard

Test, Employee

My Profile

Leave Balances as of 05/18/2022

Vacation Time 112.83 in hours

Sick Time in hours 5.25

Full Leave Balance Information

Pay Information

Taxes

My Activities

Enter Leave Report

Approve Time

Approve Leave Report

- Click the “Approve Time” link in the ‘My Activities’ section of the Employee Dashboard.

*Note: Warning – A message stating “No Timesheet documents available for approval” will appear.*

*This is expected.*

SWARTHMORE

Test, Employee 1

Employee Dashboard • Time Entry Ap

No Timesheet documents available for approval.

Approvals - Timesheet

Proxy Super User

- Select the “Proxy Super User” link in the upper right hand corner of the Time Entry Approvals window.

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Test, Employee 1

Employee Dashboard • Time Entry Approvals

Approvals - Timesheet

Proxy Super User

Approvals Leave Report

Timesheet All Departments All Status except Not Star... Enter ID/Name

- In the ‘Act as a Proxy For’ section, use the drop down menu to select available employees.

Act as a Proxy for

Phillips, Karen S. - [Payroll]

Self -Test, Employee - [Human Resources Office]

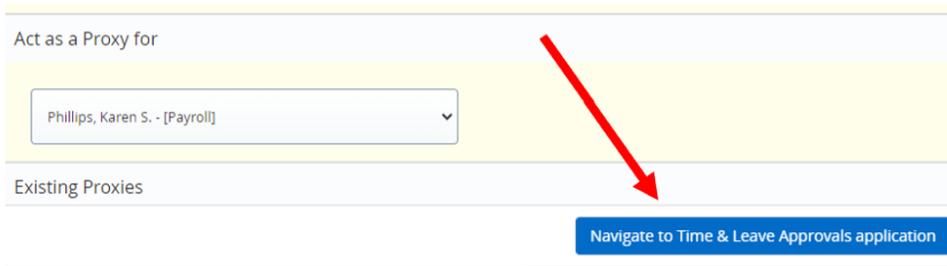
Phillips, Karen S. - [Payroll]

Existing Proxies



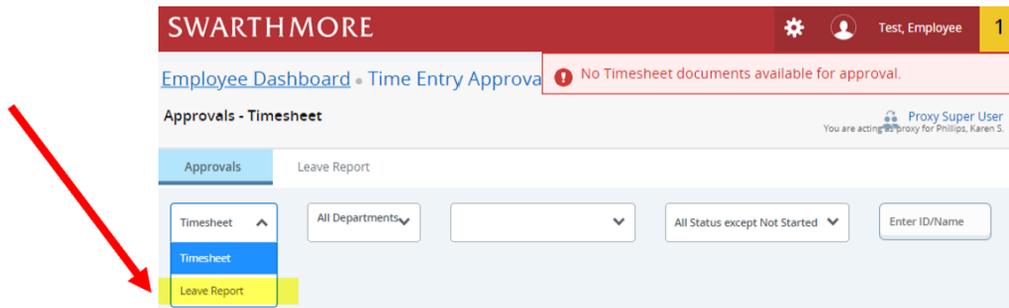
Self Service will confirm that you are acting as a proxy in the upper right hand of the Proxy or Super User window.

- Click the **Navigate to Time & Leave Approvals Application** button.



By default the Timesheet option is selected. To approve available Leave Reports.

- Click on the drop-down and choose Leave Report. You can now follow the 'Approve a Leave Report' instructions.



*Note: If you do not see the expected employees' Leave Reports, and you have verified they have submitted them for approval, please contact Payroll@swarthmore.edu.*