SAP SuccessFactors

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Managing and Using Proxy and Delegation

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Content

1 Overview of Proxy and Delegation

Apart from Role-Based Permissions and user account management, you can use proxy and delegation to further fine-tune access management. Proxy and delegation allow people to access data and perform tasks on behalf of others in the system for a period of time.

As powerful as they are, don't use proxies with delegation. For example, a proxy shouldn't set up delegations on behalf of others.

1.1 Proxy Access

Proxy access allows one person to access another person's user account and act on their behalf, for a specific purpose and in specific areas of the system.

When to Use Proxy Access

Most customers use proxy access in one of two primary cases:

- Ensuring that important business processes aren't interrupted by an individual employee's absence
  For example, if an employee is unavailable or absent when a form is due, an assigned proxy can complete the form on the employee's behalf.
- Troubleshooting and testing
  You can use proxy access to quickly test how the system behaves for different users and different roles, without manually logging in and out of different user accounts.

> ⚠ Caution
>
> Proxy access gives **broad access** to someone's user account. For areas where they have proxy rights, a proxy can see the same information and take the same actions that the account holder can. In some places, a proxy may even have access to sensitive personal data, such as a national ID, or to other private data, such as a compensation statement.
>
> **Plan usage of proxy access carefully and make sure it aligns with the data protection and privacy requirements of your organization.**

Understanding Proxy Access

To understand how proxy access works, you just need to understand a few key concepts:

- A **proxy assignment** defines a proxy relationship between two people, an account holder and a proxy.

- A **proxy** is the person who's been assigned to act on someone else's behalf.
- An **account holder** is the person whose account the proxy can access and on whose behalf the proxy can act.
- You can grant specific **proxy rights** for each proxy assignment. Proxy rights define which specific areas of the system the proxy is allowed to access.
- You can **control who's allowed to manage proxy assignments**. You can centralize control with a small group of proxy administrators or enable everyone in the organization to assign their own proxy.
- By default, proxy assignments are **indefinite**. However, you can set a start time or end time, if necessary.

> Example
>
> For example, John is going on vacation and Sarah is assigned to act on his behalf. John is the account holder and Sarah is the proxy. John is a hiring manager on some open requisitions, so Sarah is granted proxy rights to Recruiting to ensure the recruiting process moves forward. There aren't any other essential business processes during John's absence so Sarah isn't granted any other proxy rights.
>
> As a proxy, Sarah can act on John's behalf in the recruiting process but **not** in other processes, such as performance reviews for his team. She can **not** see any of John's personal profile data, such as his compensation statement.

1.2 Alternatives to Proxy

Proxy access isn't the only way for one user to act on the behalf of another. Here are some alternatives to using proxy access in some scenarios.

- 360 Reviews - Use Executive Review or reporting.
- Compensation and Variable Pay - Use template permission, second manager, Executive Review, or reporting. Since compensation cycles are typically short, you might choose to create a shared account for admin privileges and, potentially in the route map, to eliminate the need to change the name in case there's turnover. In this case, actual users proxy into the shared user account to manage the compensation process.
- Employee Central - Use role-based permission or reporting.
- Learning - Use admin permission.
  Proxy permission is a Learning admin permission. It isn't controlled by role-based permission. You can't access Learning using platform proxy access.
- Onboarding 1.0 - Reassign activities.
- People Profile - Use role-based permission or reporting.
- Performance & Goals - Use Goal Management template permission, Performance Management route map for inclusion in workflow, or reporting.
- Recruiting - Use team assignment for job requisition visibility.
- Succession Planning - Use role-based permission.
- Workforce Analytics and - Use role-based permission.

1.3 Delegation for Performance Reviews

With the delegation feature, users, usually managers, can delegate their performance review tasks to other people within a specified time period. It also allows administrators to create delegations on behalf of managers.

Overview

> Note
>
> - For the latest updates and discussions, visit the SAP SuccessFactors Customer Community Important Notes for the Delegation Feature.
> - For a high-level overview of the delegation workflow, detailed configuration steps, and answers to common questions about the product, visit the SAP SuccessFactors Customer Community New Guidance for Delegation Management in Performance Management.

Here are the key concepts in this feature:

- **Initiator**: Someone who initiates a delegation by creating a delegation request. An initiator can be the delegator themselves, or an administrator who creates a delegation for the delegator.
- **Delegator**: Someone whose task is delegated to someone else. In the context of performance reviews, delegators are usually managers.
- **Delegatee**: Someone who is delegated with a task. For example, matrix managers.
- **Employee**: A subject user of the delegated task. For performance reviews, employees are the subjects of the forms to be reviewed.
- **Valid Period**: The time during which a delegation request is valid.

On the *Settings* > *Delegation* page, a user can act as a delegator to create and manage delegation requests, or as a delegatee to act on the delegation requests they received. An administrator works in the *Delegation Management* admin tool, creating delegation requests on others' behalf and manage those requests.

The following example explains how the delegation process works:

1. **Create Delegation:**
   Manager Jackie would like someone to review the performance forms of her direct reports, Jim and Sarah, during her absence, so she creates a delegation request. Or, administrator Alex creates the request on Jackie's behalf. Either way, in this request, Jacke's peer Paul is selected as the delegatee, and Jim and Sarah are selected as employees. The form template and the delegation valid period are also specified.
2. **Respond to Delegation:**
   Paul receives an email notification about this delegation request. He goes to the *Delegation* page where he can view more details and choose to accept or decline. Jackie is notified of his decision by email. In this case, Paul accepts the delegation.
3. **Perform Delegated Task:**
   Once the delegated forms are ready for Jackie's review, Paul sees a *Go to Task* button on the *Delegation* page. This button enables him to review Jim and Sarah's forms during the valid period. Meanwhile, these forms remain in Jackie's Inbox, but in the read-only mode.
4. **Edit or Cancel Delegation:**

Jackie has the flexibility to edit the valid period of this delegation, or cancel it at any point, should circumstances change. These can also be done by Alex, if it was the administrator who initiated the delegation. When it's canceled, Jackie can continue the review process by herself.

5. **Complete Delegated Task:**
   Paul completes the performance assessments for Jim and Sarah and sends the forms to the next step. His involvement as Jackie's delegatee is reflected in the route map step descriptions on the forms and the audit trail tables.

All email notifications sent during the workflow are listed in this table:

Notification Sent When a Delegation Is...	Recipients
Created and pending action	Delegatee
Accepted or declined	Delegator and delegatee
Canceled manually	Delegator and delegatee
Auto-canceled due to inaction	Delegator and delegatee
Expired	Delegator and delegatee

Permissions

- For a delegation to work, proper role-based permissions must be configured. Refer to *Permissions for Delegating Performance Review Task* in Related Information.
- There's no need to configure form permissions for the delegatee. While reviewing the delegated form, they're automatically granted the delegator's form permissions.

Notes

- When using proxy, users can't access the delegation feature.
- Only active users can be selected as the delegator or delegatee during the delegation creation process.
- You can't delegate the same task to two delegatees. To change the delegatee, cancel the first delegation request and then delegate the task to a new delegatee.
- Forms involved in delegations can be purged as usual using the *Data Retention Management* admin tool. However, purging delegation requests isn't yet supported.
- Audit reports currently don't contain delegation-related information, such as changes made by the delegatee to the delegated form.
- A delegatee's name isn't recorded in the route map or audit trail, if they participate in a collaborative step with an exit user, and they aren't the exit user. This is because they aren't the one who routes the form.
- On the *My Forms* page, the Currently With and Sent From columns don't display the delegatee's name because, during delegation, the forms remain in the delegator's Inbox.
- The following form features are **not** available to the delegatee when they're reviewing delegated forms.
  - Team Ranker
  - Form history

- Last ratings
- Compensation section
- Additional employees in the overall performance-potential matrix
- Recall a form in the Get Feedback feature
- Delete a form
- Add learning activities in the development goal section
- Form snapshot links in Audit Trail for actions made by other users (even though *Everyone can access the revision history of the document* is selected in *Company System and Logo Settings*)
- (Only for systems with the legacy Goal Management) Add, edit, or delete goals on the form
- (Only for systems with Talent Intelligence Hub) Add or delete skills or competencies on the form

- In case of a manager change that triggers transferring a delegated form from the old manager to the new manager, the delegation involved is transferred as well (if the following conditions are met). Specifically, the system automatically cancels the delegation for the old manager and creates a new one with the new manager as the delegator. The delegatee can continue working on the delegated task.
  Conditions for a delegation transfer:
  - The delegated form is ready for manager review at the moment.

    > ⓘ Note
    >
    > If the review step is in the future and the delegation is still needed after a manager change, a new delegation request for the new manager has to be created manually.

  - The delegation's status is pending or accepted.
  - The new manager doesn't have a delegation with the same delegatee, employee, and an overlapping valid period.
  - The delegator's role is EM (Manager) or EX (First Matrix Manager).

1.4 When to use Delegation vs. Proxy: Understanding the Difference

Understand the key differences between delegation and proxy features, so you know when and how to use each one to manage tasks and permissions effectively.

Below is a table outlining the key differences between the delegation and proxy features to help you understand when to use each.

Proxy	Delegation
Proxy access grants full access into the account holder's module information/permissions that the account holder has when you are granted that proxy relationship	Delegation includes a workflow between one individual and others to whom they wish to delegate a specific task within the context of a product.
Example: Granting Proxy rights to Performance Management	**Example**: Delegating a Performance Review
Function: Gives the proxy user full permissions/access to subject user's forms, overview, inbox and all information on the form.	**Function**: Gives the delegatee access only to the form(s) for which the assessment/review is required.

As you can see from the table above, if you're looking to give someone full access to an account holder's module information and permissions, then you'd use Proxy. For example, granting Proxy rights in Performance Management allows the proxy user to manage forms, the inbox, and all relevant information as if they were the account holder themselves.

On the other hand, if you need to assign a specific task to someone without granting full access to an account, Delegation is the better option. For instance, delegating a Performance Review gives the delegatee access only to the form necessary for completing the review, without providing broader access to the account holder's information.

2 Managing and Using Proxy

Learn about setting up, managing, and using proxy access in the system.

2.1 Leading Practices for Using Proxy Access

Here are some leading practices for setting up and using proxy access.

DO

- **Do** assign a proxy for a specific purpose, such as moving a specific business process forward or troubleshooting a specific issue.
- **Do** assign a proxy who maintains a close working relationship with the account holder and only exercises proxy rights when required.
- **Do** audit the existing proxy assignments from time-to-time, as a part of an overall governance process. Remove questionable proxy assignments or consult with the account holder to see if it's still needed.

> Example
>
> An executive assistant is an example of good proxy usage. An assistant can use proxy access to take administrative actions on behalf of an executive.

DON'T

- **Don't** use proxy access to perform actions on behalf of people who can or should perform the actions themselves.
- **Don't** use proxy access as a shortcut to see information that could also be seen with reports or made visible with role-based permissions.
- **Don't** assign too many proxies for the same user account. Multiple proxies can overwrite each other's changes.
- **Don't** assign too many user accounts to the same proxy. It's difficult for a proxy to maintain a close working relationship with too many account holders.

> Example
>
> Generally speaking, it's ill-advised to assign one person as the proxy for many account holders. For example, it's **not** a leading practice to assign one Human Resources representative as the proxy for everyone in a given location, for all business processes. Broad proxy access should be restricted to a small group of proxy administrators only.

2.2 Setting Up Proxy Access

Set up proxy access so that a proxy can be assigned to act on another person's behalf.

Procedure

1. Enable proxy access in Provisioning.

   > → Remember
   >
   > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.
2. Define who can make proxy assignments in your organization.

   You can set up control of proxy assignments in three ways:
   - **Centralized** control, where a small group of administrators centrally manages proxy assignments for everyone in the organization.
   - **Individual** control, where individual people can assign their own proxy, without an administrator.
   - **Both centralized and individual** control, where both options are allowed simultaneously.
3. Configure other optional proxy settings.

2.2.1 Enabling Proxy Access in Provisioning

Enable the proxy feature so that it can be set up in your system.

Prerequisites

You have access to Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. Log in to Provisioning and go to *Company Settings*.

2. Select the *Enable Proxy Feature* setting.
3. Save.

Results

The proxy feature is enabled.

Next Steps

Proceed to configure control of proxy assignments, centrally or individually.

2.2.2 Configuring Proxy Settings

Configure optional settings for the proxy feature.

Prerequisites

You have the *Proxy Management* permission.

Procedure

1. Go to *Admin Center* > *Proxy Management*.
2. Select *Always enable proxy lookup* to enable account holders to look up people by name when assigning a proxy. Otherwise, they need to know the person's username in advance.

   > Note
   >
   > This setting is only necessary if you're **not** using the employee directory feature. If you already use the employee directory, it has no effect.

3. Select *Enable Advanced Proxy Management (Proxy Now and Proxy Import)* to enable more functionality.

   If selected:
   - *Proxy Now* appears in the user preference menu, under your name in the global page header, for anyone with proxy rights. Otherwise, proxies have to go to *Settings* > *Proxy* instead.
   - The *Proxy Import* page enables administrators with *Proxy Management* permission to manage multiple proxy assignments at the same time, using a CSV import file. Otherwise, you have to manage them one by one in the Admin Center.

4. Choose *Save Proxy Settings*.

2.2.3 Configuring Individual Control of Proxy Assignments

If appropriate, give everyone in your organization the ability to assign their own proxy, without a central administrator.

Prerequisites

You have the *Company System and Logo Settings* permission.

Context

Most customers choose centralized control of proxy assignments, for stricter internal controls and greater data privacy. However, if you decide it's appropriate for your organization, you can allow all account holders to assign their own proxy, without an administrator.

Individual control of proxy assignments is independent of central control. You can choose to simultaneously allow central control of proxy assignment as well.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Select or deselect the *Disable Proxy access for users without Proxy rights* setting as required.
   - **Select** the setting to **block** individuals from assigning their own proxy.
   - **Deselect** the setting to **allow** individuals to assign their own proxy.
3. Save.

Next Steps

Proceed to configure optional proxy settings.

2.2.4 Configuring Centralized Control of Proxy Assignments

Use role-based permission to give a small group of administrators the ability to manage proxy assignments for your organization.

Prerequisites

You can manage role-based permissions.

Context

Proxy administrators have broad access to other people's user accounts and personal information. Limit the number of people with *Proxy Management* permission as much as possible and advise them to only use it when necessary.

> ⚠ Caution
>
> People with *Proxy Management* permission **automatically have proxy access to every user account in the target population** of the permission role, whether or not a proxy assignment has been explicitly created. For example, an administrator with *Proxy Management* permission for all employees in North America can act as a proxy for all employees in North America.
>
> > ⓘ Note
> >
> > Proxy access based on the *Proxy Management* permission doesn't have a time range. It starts as soon as the permission is granted and it has no end date.

Procedure

1. Identify the permission role or roles that you want to give *Proxy Management* permission to.
2. Ensure that the identified permission roles have the appropriate target population.

   > ⓘ Note
   >
   > *Proxy Management* permission requires a target population. You can only create a proxy assignment if **both the account holder and the proxy** are in the target population of the role.

3. For each identified permission role, go to *Administrator Permissions* > *Manage User* and grant *Proxy Management* permission.

Results

People in the permission role can use the *Proxy Management* and *Proxy Import* pages to manage proxy assignments. They can also act as a proxy for anyone in their target population.

Next Steps

Proceed to configure optional proxy settings.

2.3 Proxy Management in Admin Center

Use the *Proxy Management* page in the Admin Center to add, edit, look up, or remove proxy assignments.

> ⚠ Caution
>
> If users have proxy permissions assigned to them from both Role-based Permissions **and** from the **Proxy Management** screen, then those users **will not** show up on the User Data File. If you want users to appear on the User Data File, make sure their proxy permissions are assigned **only** through Proxy Management.

2.3.1 Creating a Proxy Assignment

Create a proxy assignment so that the specified proxy can act on behalf of the specified account holder.

Prerequisites

You have the *Proxy Management* permission.

Procedure

1. Go to *Admin Center* > *Proxy Management*.
2. Use search boxes in the *Grant Proxy* section to find and select the proxy and the account holder.
3. Use checkboxes in the *Grant Proxy Rights* section to select specific areas of the system that the proxy can access.

> ⓘ Note
>
> Some checkboxes are indented to indicate that they have a dependency on another checkbox. For example, the *Private Objectives* checkbox is indented under the *Total Goal Management* checkbox because it has a dependency. You can only select *Private Objectives* if you also select *Total Goal Management*.

4. Set a time range for the proxy assignment. Select a *Start* date and time and an *End* date and time.

> ⓘ Note
>
> - Please note that the time range is now a mandatory field.
> - Start and end times are based on the time zone of the proxy administrator who sets them, as shown on their Employee Profile. If no time zone is defined, they're based on the time zone set on the proxy administrator's computer or device. For example, if you're a proxy administrator located in Germany, your profile might list your time zone as Central European Time. Or, if it doesn't, your computer is probably set to that time zone. If you want to create a proxy assignment for people in New York that starts at 9:00 AM and ends at 5:00 PM Eastern Standard Time, you need to calculate and provide start and end times based on your location, starting at 3:00 PM and ending at 11:00 PM Central European Time.

5. Choose *Save*.

> ⓘ Note
>
> Choose the *Save* button immediately following the checkboxes, **not** the *Save Proxy Settings* button at the bottom of the page.

Results

The proxy can access the account holder's user account, with proxy rights only for the areas of the system you selected. In those places, they can see everything that you can see and can act on your behalf.

2.3.2 Finding an Existing Proxy Assignment

Find existing proxy assignments for a specified proxy or account holder.

Prerequisites

- You have the *Proxy Management* permission.
- You have *Company Info Access* and *User Search* permission so you can look up a person to assign as your proxy.

Procedure

1. Go to *Admin Center* > *Proxy Management*.
2. Use search boxes in the *Look Up Existing Assignments* section to find existing proxy assignments.
   - Enter a name in the *Account Holder* field and choose *Search for Proxy*
   - Enter a name in the *Proxy* field and choose *Search for Account Holders* to see a list of account holders for whom the specified person is a proxy. to see a list of proxies for the specified person.

Results

A list of existing proxy assignments is displayed.

> **Note**
>
> to see a list ofStart and end times are displayed in your time zone, as the logged-in proxy administrator, as defined on your employee profile. If no time zone is defined on your profile, they're displayed in the time zone set on your computer or device.

Next Steps

For each proxy assignment listed, you can delete it or edit the start and end time.

2.3.3 Setting a Time Range for Proxy Assignments

Set a time range for an existing proxy assignment so that it starts or ends at a specified date and time. You can add a start date, an end date, or both.

Prerequisites

You've looked up the existing proxy assignments for an individual proxy or account holder.

Context

Setting a time range is optional. If you don't set a time range, proxy assignments start as soon as they are created and have no end date.

You can only edit proxy assignments for one at a time on the *Proxy Management* page. To make multiple changes at once, use *Proxy Import* instead.

Procedure

1. Review existing proxy assignments for the specified person, in the *Look Up Existing Assignments* section of the *Proxy Management* page.
2. Select the people whose proxy assignment you want to set a time range for.
3. Choose *Edit*.
4. For each proxy assignment, select a *Start* date and time, an *End* date and time, or both.

   > Note
   >
   > Start and end times are based on the time zone of the proxy administrator who sets them, as shown on their employee profile. If no time zone is defined, they're based on the time zone set on the proxy administrator's computer or device.
   >
   > > Example
   > >
   > > For example, if you're a proxy administrator located in Germany, your profile might list your time zone as Central European Time. Or, if it doesn't, your computer is probably set to that time zone. If you want to create a proxy assignment for people in New York that starts at 9:00 AM and ends at 5:00 PM Eastern Standard Time, you need to calculate and select start and end times based on your location, starting at 3:00 PM and ending at 11:00 PM Central European Time.

5. Choose *Save*.

Results

The time ranges you define take immediate effect. The proxy now only has access to the account holder's account during the specified time range.

2.3.4 Deleting a Proxy Assignment

Delete a proxy assignments for a specified proxy or account holder, after its end date or when it's no longer needed.

Prerequisites

You've looked up the existing proxy assignments for an individual proxy or account holder.

Context

You can only view proxy assignments for one person at a time. To make multiple changes at once, use *Proxy Import* instead.

Procedure

1. Review existing proxy assignments for the specified person, in the *Look Up Existing Assignments* section of the *Proxy Management* page.
2. Select the checkbox next to the names of people you want to remove from the proxy assignment.
3. Choose *Delete*.

Results

The selected proxy assignments are immediately deleted.

2.3.5 Creating, Editing, or Deleting Proxy Assignments with an Import File

Use a CSV import file to add, edit, or remove multiple proxy assignments at the same time.

Prerequisites

You have the *Proxy Management* permission.

Procedure

1. Go to *Admin Center* > *Proxy Import*.
2. Use the link provided to download a blank CSV template.

   > ⓘ Note
   >
   > There's no export function for proxy assignments. Always start from a blank template.

3. Add a row in the import file for each proxy assignment that you want to add, edit, or remove.

   Define the proxy relationship with the following values:

- `USERID` is the account holder, identified by User ID.
- `PROXYID` is the proxy, identified by User ID.

> → Tip
>
> You can assign multiple proxies to a single account holder, using the pipe symbol (|) between IDs. For example: `jsmith|ychang`

> ⓘ Note
>
> Alternatively, you can identify people by Assignment ID instead of User ID. To use Assignment ID, leave `USERID` and `PROXYID` blank and enter values in the `ASSIGNMENT_ID_USERID` and `ASSIGNMENT_ID_PROXYID` columns instead.

4. For each row, set a time range for the proxy assignment. You can add a `START_DATE` and an `END_DATE` in **yyyy-MM-dd HH:mm** format.

> ⓘ Note
>
> - Please note that the time range is now a mandatory field.
> - Start and end times are based on the time zone of the proxy administrator who sets them, as shown on their Employee Profile. If no time zone is defined, they're based on the time zone set on the proxy administrator's computer or device. For example, if you're a proxy administrator located in Germany, your profile might list your time zone as Central European Time. Or, if it doesn't, your computer is probably set to that time zone. If you want to create a proxy assignment for people in New York that starts at 9:00 AM and ends at 5:00 PM Eastern Standard Time, you need to calculate and provide start and end times based on your location, starting at 3:00 PM and ending at 11:00 PM Central European Time.

5. For each row, select which product area the proxy can access in the account holder's account.
   - Enter `YES` in the `ALL` column to **grant proxy rights for all product areas**, so that the proxy can do everything the account holder can do.
   - Enter `YES` in the `REMOVE ALL` column to **remove proxy rights for all product areas** for the specified account holder and delete the proxy assignment.
   - Enter `YES` in one or more columns named for different product areas (like Performance Manager Forms) to **grant proxy rights for specific product areas**.
   - Leave cells blank in one or more columns named for different product areas (like Performance Manager Forms) to **remove proxy rights for specific product areas**.

> ⚠ Caution
>
> - Don't enter the value `NO` in any column. The value `NO` is implied by a blank cell. If you enter `NO`, the import fails for that record. Other changes in the import file can still be processed.

> ⚠ Caution
>
> The *Proxy Import* feature doesn't support granular proxy rights for Reporting. With the CSV import file, you can only grant or remove **all** proxy rights for Reporting, for all proxy assignments in the file. You can only grant granular proxy rights in the user interface (either in *Proxy Management* or in personal user settings).

- If the import file says `YES` in the `Reporting` column and granular Reporting proxy rights are already granted in the user interface, then the **existing granular Reporting proxy rights are retained**. The import file doesn't change them.
- If the import file says `YES` in the `Reporting` column and proxy rights for Reporting haven't been granted yet or it's a new assignment, then **all Reporting proxy rights are granted** by the import file.
- If the import file is blank in the `Reporting` column, then **all Reporting proxy rights are removed** by the import file.

→ Tip

Some proxy rights are dependent on others. In the *Proxy Management* tool, these dependencies are enforced by the user interface. But in the CSV import file, they appear as separate columns. To avoid errors with the import, be sure to select the same proxy rights in the CSV file that you're allowed to select in the user interface.

For example, in the user interface, you can only select *Private Objectives* if you also select *Total Goal Management*. To grant proxy rights to private goals in the CSV file, be sure to enter `YES` in both the `Private Objectives` column and the `Total Goal Management` column.

→ Tip

Use the `REMOVE ALL` column to periodically delete proxy assignments for inactive users in bulk.

Example

For example, an import file like the following table would create a proxy assignment for `user02` to act as the proxy for `user01`. For simplicity, this example only shows columns for Goal Management, but, in most cases, there are many more columns. Notice that all of the proxy rights for Goal Management are granted to the proxy user **except** for *Private Objectives*. That means that the proxy **doesn't** have access to that account holder's private goals.

USERID	ASSIGNMENT_ID_USERID	PROXYID	ASSIGNMENT_ID_PROXYID	START_DATE(yyyy-MM-dd HH:mm)	END_DATE(yyyy-MM-dd HH:mm)	All	Remove All	Goals Tab	Total Goal Management	Private Objectives	Career Development Planning
user01		user02		2022-01-01 00:00	2022-06-30 23:59			YES	YES		YES

Note

For the *Performance Manager Forms* column of the proxy import file, use pipelines to separate multiple values. For example, use 12|19|44|1.

6. Save the import file in CSV format and go back to *Admin Center* > *Proxy Import*.
7. Choose the saved import file.

8. Select the appropriate character encoding.
9. Choose *Import Proxies* and then *OK* to confirm.

Results

Proxy assignments included in the file are added, updated, or removed.

2.3.6 Giving Unrestricted Proxy Access for Test Purposes

To create proxies with unrestricted access, for test purposes only, add proxy assignments to the user data file.

Prerequisites

You have permission to manage user information for a target population that includes both the account holder and the proxy.

Context

> ⚠ Caution
>
> To protect data privacy, **don't** use this proxy assignment method in a production system with real user data. A proxy assigned with this method can see and do **everything** the account holder can see and do, including sensitive personal data.

Use this method in a Test or Preview instance to quickly grant unrestricted proxy rights, for convenience during testing. If you don't plan on using proxy access in production, but want to use it during testing only, this method is simpler. Just remember to remove the unrestricted proxy assignments before moving user data to your production instance.

Procedure

1. Export the user data file.
2. Add or find the `Proxy` column.
3. For each account holder you want to assign a proxy for, add one or more proxies in the `Proxy` column.

   Identify proxies by User ID and separate multiple proxies with a pipe (|) character.
4. Import the user data file.

The assigned proxy now has unrestricted access to the corresponding account holder's user account.

5. Use the proxy user account for testing so that you can quickly test features as people in different roles.
6. When you're done with testing, remove proxy assignments by exporting the user data file, clearing all values from the `Proxy` column, and importing it again.

2.3.7 Auditing Proxy Access

Audit reports enable you to track changes that are made to proxy assignments or see when other changes are made by a proxy.

Changes to Proxy Assignments

You can use the *Proxy Assignment Change* audit report to see who made changes to proxy assignments, over a given time range, and which proxy rights were granted or removed.

Changes Made by a Proxy

In **any** change audit report, you can use the `Proxy: Logged in User` columns to see if a particular change was made by a proxy.

If it was, these columns show the first name, last name, and username of the proxy who made the change. The `Changed By User` columns show the first name, last name, and username of the account holder whose account was used.

If `Proxy: Logged in User` is blank, the change wasn't made by a proxy.

> Note
>
> For details on how to create change audit reports and how to read the *Proxy Assignment Change* report, refer to the *Change Audit* guide.

Related Information

Creating a Change Audit Report
Proxy Assignment Change Report

2.4 Using Proxy as an Employee

2.4.1 Assigning a Proxy to Act on Your Behalf

Assign a someone as your proxy so that they can access your account and act on your behalf.

Prerequisites

- Administrators have allowed you to assign your own proxy.
- You have *Company Info Access* and *User Search* permission so you can look up a person to assign as your proxy.

Procedure

1. Open the menu under your photo in the global page header at the top of any page, and choose *Settings* to view your personal user settings.
2. Go to *Proxy* > *Assign Proxy* to open your proxy settings.

   You see a list of your existing proxies and the specific areas of the system they're allowed to access on your behalf.
3. Add or select the person you want to act as your proxy.
   - To add a new proxy, choose *Add a proxy*. Then find and select someone.
   - To edit proxy rights for an existing proxy, select their name on the list.
4. Use checkboxes in the *Grant Proxy Rights* section to select specific areas of the system that the proxy can access.
5. **Optional:** Set a time range for the proxy assignment. Select a *Start* date and time, an *End* date and time, or both.

   If you don't set a time range, proxy assignments start as soon as they're created and have no end date. Use this option to restrict proxy assignments to the specified time range.

   > Note
   >
   > Start and end times are based on your time zone, as shown on your employee profile. If no time zone is defined, they're based on the time zone set on your computer or device.
   >
   > > Example
   > >
   > > For example, if you're located in Germany and you create a proxy assignment that starts at 9:00 AM and ends at 5:00 PM, the proxy access is based on Central European Time. If your proxy is located in New York, the assignment starts at 3:00 AM and ends at 11:00 AM Eastern Standard Time.

> If you want to specify the start and end times for your proxy's location, you need to calculate them and enter them in your local time. For example, to start the assignment for your proxy in New York at 9:00 AM Eastern Standard Time, select a start time of 3:00 PM, the corresponding time in Germany.

6. Save.

Results

The person you assigned as your proxy can now access your user account and act on your behalf in the areas of the system you specified. If you specified a time range, they only have proxy access during that time period.

2.4.2 Delete a Proxy Assignment from Your Account

Remove a proxy assignment so that your assigned proxy can no longer access your account.

Prerequisites

Administrators of the system have allowed you to assign your own proxy.

Procedure

1. Open the menu under your photo in the global page header and choose *Settings* to view your personal user settings.
2. Go to *Proxy* > *Assign Proxy* to open your proxy settings.

   You see a list of your existing proxies and which specific areas of the system they're allowed to access on your behalf.
3. Choose X next to the name of an existing proxy to delete the proxy assignment.
4. Choose *OK* to confirm.

Results

The proxy assignment is removed. The person can no longer access your account as a proxy.

2.4.3 Acting as a Proxy for Someone

If you've been assigned as someone's proxy, you can use proxy access to access their account and act on their behalf.

Prerequisites

You've been assigned as the proxy for a given account, either by the account holder or by a proxy administrator.

Context

There are different ways to initiate and end proxy access, depending on how the system is configured. Choose the method that's more convenient for you.

Procedure

1. Initiate proxy access.
    - Open the menu under your photo in the global page header and choose *Proxy Now* if the option is available. Then find and select the account holder that you're a proxy for.
    - Otherwise, open the menu under your name, at the top of any page, and go to *Settings* > *Proxy* > *Become Proxy*. Then find and select the account holder that you're a proxy for and choose *Go*.

    > **Note**
    >
    > In search results, you can see all account holders that you're a proxy for, but if the proxy assignment has a specified start date and it hasn't started yet, you can't initiate proxy access. Try again after the start date.

    You're navigated to the account holder's home page. You can see that you're acting as a proxy by hovering on the avatar photo in the page header and confirming that there's a "on behalf of" message. For example, if Carla Grant is acting as proxy for Geoff Hill, it says "Carla Grant on behalf of Geoff Hill".
2. Navigate to an area of the system that you have proxy rights for and take the required action.
3. End proxy access.
    - If you used the *Proxy Now* option in Step 1, use the same menu to choose *Become Self*.
    - If not, use the same menu to go to *Settings* > *Proxy* > *Become Self*.

    You're navigated back to your own home page. You can see that you're no longer acting as a proxy by hovering on the avatar photo in the page header and confirming that the "on behalf of" message has disappeared. For example, after Carla Grant stops acting as proxy for Geoff Hill, it just says "Carla Grant".

3 Managing and Using Delegation

Learn about setting up, managing, and using delegation in the system.

3.1 Enabling Delegation

Enable the delegation feature so that users and administrators with proper permissions can delegate Performance Management forms to other people within a time period.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Procedure

1. In Admin Center, go to *Company System and Logo Settings*.
2. Select *Enable Delegation Feature*.
3. Save your change.

3.1.1 Permissions for Delegation

Learn about the role-based permissions that must be configured before users and administrators can start using delegation.

For example, you want all managers in your organization to be able to delegate the tasks to their peers and those directly above them, so these people can review forms for the managers' direct reports. You also want to enable a group of administrators to create such delegations on the managers' behalf.

In this case, the different delegation roles are as follows:

- Initiators: managers and administrators
- Delegators: managers
- Delegatees: managers' peers and those directly above them
- Employees: managers' direct reports

You can find which permissions need be granted to whom, as well as an additional permission role that must be configured, in the following table:

Role-Based Permissions for Delegation

Permission	Assign Permission To...	Target Population	Permission Description
Administrator Permissions > *Manage System Properties* > *Company System and Logo Settings*	Administrators		Allows administrators to configure system-wide settings, including enabling delegation feature and specifying a date range for auto-cancellation of delegation requests.
Administrator Permissions > *Manage Delegation* > *Delegation Management*	Administrators	Delegators and delegatees	Allows administrators to access the *Delegation Management* admin tool, where they can create a delegation request for someone whose task needs to be delegated, and manage all delegations in the system.
User Permissions > *Delegation* > *Create Delegation Based on Form Templates*	Initiators (users or administrators)	N/A	Defines which form templates can be selected during the delegation creation process.
User Permissions > *Delegation* > *Delegator-Delegatee Relationship*	Delegators	Delegatees	Defines who can be selected as the delegatees of a delegator during the delegation creation process.
User Permissions > *Delegation* > *Delegator-Employee Relationship*	Delegators	Employees	Defines who can be selected as the subject users to be reviewed during the delegation creation process.
Permissions in the Performance Reviewer (Delegation) permission role For details, refer to Understanding the "Performance Reviewer (Delegation)" Permission Role.	N/A	N/A	This permission role allows delegatees to access delegated forms and use specific form features.

Note

Create separate permission roles to grant the preceding permissions.

3.1.2 Specifying Date Range for Auto-Cancellation of Delegation Requests

Specify a date range for the system to automatically cancel a delegation request if the delegatee doesn't accept or decline the request.

Prerequisites

You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.

Procedure

1. In Admin Center, go to *Company System and Logo Settings*.
2. Enter a whole number larger than 0 for the field *Specify a date range for automatic cancellation of a delegation request if no action is taken by the delegatee*.
3. Save your change.

3.2 Using Delegation

Managers and employees can delegate tasks to others using the delegation feature. Administrators can help create delegations on behalf of managers and employees.

3.2.1 Delegating Your Performance Review Task

Create a delegation request to ask someone to review the performance of your employees on your behalf.

Prerequisites

- *Enable Delegation Feature* is selected in *Company System and Logo Settings*.
- As the initiator, you have the following permission under *User Permissions* > *Delegation*:
  - *Create Delegation Based on Form Templates*
- As the delegator, you have the following permissions under *User Permissions* > *Delegation*:

    - *Delegator-Delegatee Relationship*
    - *Delegator-Employee Relationship*
- The Performance Reviewer (Delegation) permission role is created with all necessary permissions.

For more information, refer to Permissions for Delegation [page 26].

Procedure

1. Select your profile picture or icon in the global page header to open the account navigation menu, and choose *Settings*. Then choose *Delegation*.
   You're on the *Received* tab of the *Delegation* page.
2. Switch to the *Sent* tab.
3. Select *Create* in the upper right corner.
4. In the *Create Delegation* wizard, complete the following steps:

Wizard Step	Actions
1. Select Task Type	Select *Review Performance Management Forms*.
2. Specify Delegation Details	Search for a delegatee. Select a valid period for this delegation.
3. Specify Task Details	Search for the employees to be reviewed. Select the templates of the forms to be reviewed.
4. Review	Review all the information you specified before creating the delegation.

Once you create a delegation, the delegatee receives an email notification. The delegatee can view and act on your request on the *Received* tab of their *Delegation* page. You can edit the valid period of this delegation, or cancel it at any point, should circumstances change.

3.2.2 Delegating Others' Performance Review Task

As an administrator, you can create a delegation request for another person to delegate their task of reviewing Performance Management forms.

Prerequisites

- *Enable Delegation Feature* is selected in *Company System and Logo Settings*.
- You have the *Administrator Permissions* > *Manage Delegation* > *Delegation Management* permission.
- As the initiator, you have the following permission under *User Permissions* > *Delegation*:

    - *Create Delegation Based on Form Templates*
- The delegator has the following permissions under *User Permissions* > *Delegation*:
    - *Delegator-Delegatee Relationship*
    - *Delegator-Employee Relationship*
- The Performance Reviewer (Delegation) permission role is created with all necessary permissions.

For more information, refer to Permissions for Delegation [page 26].

Procedure

1. In Admin Center, go to the *Delegation Management* admin tool.
2. Select *Create* in the upper right corner.
3. In the *Create Delegation* wizard, complete the following steps:

Wizard Step	Actions
1. Select Task Type	Select *Review Performance Management Forms*.
2. Specify Delegation Details	Search for a delegator and a delegatee. Select a valid period for this delegation.
3. Specify Task Details	Search for the employees to be reviewed. Select the templates of the forms to be reviewed.
4. Review	Review all the information you specified before creating the delegation.

Once you create a delegation, the delegatee receives an email notification. They can view and act on this request on the *Received* tab of their *Delegation* page. Both you and the delegator can edit the valid period of this delegation, or cancel it at any point, should circumstances change.

3.2.3 Understanding Delegation Errors

When using the delegation feature, you might see some error messages if things don't work as expected. This resource explains what those errors mean and gives you steps to fix them. If you can't resolve the issue, your system administrator is always there to help.

Error Type	Description	Resolution Steps
Permission Error	Occurs when there is an issue with user permissions (e.g., missing admin, delegator, or subject permissions).	• Ensure you have the required admin permissions. • Check that the delegator has proper delegator-delegatee and delegator-subject permissions. • Contact your system administrator to review permissions.
Bad Request Error	Occurs when there's an issue with the request (e.g., invalid data, user roles, or status conflict).	• Verify the delegation data is valid. • Ensure that both the delegator and delegatee are active users with appropriate roles (e.g., not inactive or temporary users). • Avoid starting multiple tasks in the same session. • Avoid simultaneous tasks in the same session. • Contact your administrator if issues persist.
Delegation Not Enabled Error	Occurs when the delegation feature or specific task type is disabled.	• Confirm the delegation feature is enabled • Check that the specific task type is allowed in the system. • Contact your system administrator for assistance.
Other Non-Specified Error	An unexpected error occurs that doesn't fit into the other categories.	• Try refreshing the page or logging in again. • If the issue continues, contact your system administrator.

By following these steps, you should be able to resolve most delegation issues on your own. If you still run into problems or need extra help, don't hesitate to reach out to your system administrator for support.

3.2.4 Email Notifications in Delegation

After a delegation request is created, accepted, declined, expired, or canceled, delegators and delegatees send and receive email notifications about the delegation request.

Email Notifications in Delegation

Scenarios	Operators	Email From	Email To	Email Subject	Email Body
Create	Administrator Delegator	Delegator	Delegatee	Action Required: New Delegation Request	You've received one or more delegation task requests. Please visit your delegation page to proceed. Go to my delegation page.
Auto cancel	System	Delegatee	Delegator	Delegation Request Canceled Due to Inaction	The delegation request sent on the behalf of {0} has been canceled per company policy because no action was taken by {1}. Please visit your delegation page for more details. Go to my delegation page.
Auto cancel	System	Delegator	Delegatee	Delegation Request Canceled Due to Inaction	The delegation request sent on the behalf of {0} has been canceled per company policy because no action was taken by {1}. Please visit your delegation page for more details. Go to my delegation page.
Expire	System	Delegatee	Delegator	Delegation Request Expired	The delegation request you sent to {1} has expired. Please visit your delegation page for more details. Go to my delegation page.

Scenarios	Operators	Email From	Email To	Email Subject	Email Body
Expire	System	Delegator	Delegatee	Delegation Request Expired	The delegation request you received from {0} has expired. Please visit your delegation page for more details. Go to my delegation page.
Accept	Delegatee	Delegatee	Delegator	Delegation Request Accepted by {1}	Your delegation request to {1} has been accepted. The task is now assigned to them. Please visit your delegation page for further details. Go to my delegation page.
Accept	Delegatee	Delegator	Delegatee	You've Accepted the Delegation Request from {0}	You have successfully accepted the delegation request from {0}. The task has been assigned to you. Please visit your delegation page to proceed. Go to my delegation page.
Decline	Delegatee	Delegatee	Delegator	Delegation Request Declined by {1}	Your delegation request to {1} has been declined. Please visit your delegation page to review or take further action. Go to my delegation page.
Decline	Delegatee	Delegator	Delegatee	You've Declined the Delegation Request from {0}	You have declined the delegation request from {0}. No further action is required on your part. Please visit your delegation page for more details. Go to my delegation page.

Scenarios	Operators	Email From	Email To	Email Subject	Email Body
Cancel	Delegator	Delegatee	Delegator	Delegation Request Canceled by {0}	The delegation request from {0} has been canceled. No further action is required. Please visit your delegation page for more details. Go to my delegation page.
Cancel	Delegator	Delegator	Delegatee	Delegation Request Canceled by {0}	The delegation request from {0} has been canceled. No further action is required. Please visit your delegation page for more details. Go to my delegation page.

ⓘ Note

In the table, {0} represents the delegator's full name, while {1} represents the delegatee's full name.

Unsubscribe from Delegation Email Notifications

Users can choose to unsubscribe from Delegation email notifications in their personal settings.

- To unsubscribe to email notifications, go to *Settings* > *Notifications* from your user profile menu on the home page. Select *Read messages in the system* and click *Save Notification*.

  ⓘ Note

  If you unsubscribe to email notifications, you'll need to manually visit the *Settings* > *Delegation* page to check for any delegation requests. Email notifications are the only way to get alerted about delegation requests.

- If you wish to subscribe to email notifications again, go to *Settings* > *Notifications* from your user profile menu on the home page. Select *Send emails to me* and click *Save Notification*.

4 Change History

Learn about changes to the documentation for proxy access in recent releases.

1H 2025

Type of Change	Description	More Info
Changed	We restructured the whole guide.	
Added	We added information on managing and using delegation.	Managing and Using Delegation [page 26]
Added	Added a note that for the *Performance Manager Forms* column of the proxy import file, use pipelines to separate multiple values. For example, use 12|19|44|1.	Creating, Editing, or Deleting Proxy Assignments with an Import File [page 18]
Changed	Setting a time range for a proxy assignment is now mandatory.	Creating a Proxy Assignment [page 14] Creating, Editing, or Deleting Proxy Assignments with an Import File [page 18]
Added	Added information on email notifications in Delegation.	Email Notifications in Delegation [page 32]
Added	Added information that you can't delegate the same task to two delegatees. To change the delegatee, cancel the first delegation request and then delegate the task to a new delegatee.	Delegation for Performance Reviews [page 5]

2H 2024

Type of Change	Description	More Info
New	We added the topic "When to Use Delegation vs. Proxy: Understanding the Difference".	When to use Delegation vs. Proxy: Understanding the Difference [page 7]
New	We added the topic "Understanding Delegation Errors".	Understanding Delegation Errors [page 31]

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