

Proxy Quick Guide Setup for Approvers



Proxy set up at a glance:

- Log into "My Info" Click
- on "Employee Services" Click
- on "Timesheet"
- Click on Proxy Set Up link
- Select Name of Proxy
- Click radial button next to Add
- Click Save
- Complete a helpdesk ticket at:
• www.montana.edu/uit

WEB TIME ENTRY – Quick reference guide for Approvers to set up a Proxy.

Approvers – Designating & Setting up A Proxy

What is a Proxy?

1. A proxy is a person, who can act as an Approver for you in your absence, such as when you are on vacation, attending a conference, or are out sick.
2. As noted in the University Policy for Delegation of Authority, supervisors (approvers) may appoint a proxy for time sheet approval. Users with a proxy role in Web Time Entry have the ability to act, and assume all privileges, for another person for time sheet approval.
3. Proxies are designated by each approver. It is the approver's responsibility to identify their proxy.
4. Prior to setting up your Proxy, make sure you notify and discuss these responsibilities with the person you want to act on your behalf and the timeframe.
5. Need help? Contact Human Resources 994-3651.

Proxy Responsibilities:

1. A proxy assumes your approval power. They are able to view the same information that you are able to view.
2. A proxy remains active until you remove them from your proxy list.
3. You must set up at least one proxy approver to approve timesheets in your absence. However, the proxy should only approve time in your absence.
4. You must inform the proxy of the appropriate payperiods to be approved.
5. You may add or delete a proxy at any time.
***In order to ensure your proxy has the correct access, you must submit a helpdesk ticket at www.montana.edu/uit to have their access reviewed.**
6. The proxy approver must verify all hours worked and ensure that any necessary corrections were made prior to approving time for payroll.
7. It is the responsibility of the proxy approver to let the employee know that a timesheet has been returned for correction either in person or by email.

To Set up Your Proxy:

1. You must set your own Proxy.
2. Go to www.montana.edu/hr
3. Click on **My Info** (located in left hand tool bar near bottom)
4. Click on **Enter Secure Area** and type in your *User ID and PIN*
5. Click on the **Login** button.
6. Click on the **Employee Services** tab.
7. Click on the **Time Sheet** link on the left side of the window
8. On the Selection Criteria page, click the **Proxy Set Up** link (in the bottom middle of the page).
9. From the **Name** dropdown box, select the person you want designated as your proxy.
10. Click in the box under **Add**.

11. Click the **Save** button.
12. After you designate your Proxy, the proxy will need to submit a helpdesk ticket at: www.montana.edu/uit
 - a. Under the "Enterprise Services" group; Click on "Account Request".
 - b. If the proxy already has a banner user name, choose "Modify existing account". If you are unsure or they do not have a banner user name, choose "Request new account"
 - c. Complete the form with your information
 - d. Under the "Module & Account Access" section, complete the Additional Comment section with the following information:
Proxy's name
Timesheet org number being assigned (zorg#)
13. If the name of the person you want to designate as your Proxy does not appear on the drop down list, you will need to contact them and have them request a Banner USER ID for Time Sheet Approval.
14. In order to set up a Banner ID for Time Sheet Approval only, you will need to let them know your time sheet org number.
15. Need help? Contact Human Resources 994-3651.

To Request a Banner ID for Time Sheet Approval (Proxy needs to request their own ID):

1. Go to: www.montana.edu/uit
2. Click on **Account Request** under the "Enterprise Services" group.
3. Complete the **Account Request** for a **New Account** form per the instructions.
4. Under "Module & Account Access" choose "Web Time Entry (WTE) Approver"
5. In the "**Additional Comments**" section:
 - a. Fill in the space with the time sheet org number given to you by the person for whom you will be a proxy. (You will not be able to proceed without this number).
 - b. Also type in "**Requesting Banner ID for Proxy set up.**"
6. Read and complete the "**Confidentiality and User Responsibility Statement.**"
7. Click on the review button and verify all information is correct then click on "**Submit Request.**"
8. When the Banner ID has been set up for your Proxy, you can proceed with the set up. Their name should now appear in the Name dropdown box.