

PROXY INSTRUCTION GUIDE (FACULTY, DESIGNEES, COLLEGE AND DEPARTMENT ADMINS)

PROXY EDITING SECTION OVERVIEW:

Proxy editing allows users to manage another individual's profile by temporarily assuming their access rights. This guide explains how to proxy edit as a faculty or non-faculty member within the system.

ACCESSING PROXY EDITING SECTION

PROXY LOG IN NAVIGATION:

 Log in: The system using your credentials (<u>See Navigation Guide</u>).
 NOTE: If you have proxy editing privileges, a gray banner will appear at the top of the screen. This banner remains visible regardless of which tab you are on.

Proxy Editing 🗩	k,		
Faculty Insight			AG Ali Gator ~
Search Activities Rep	orting Admin Customization V	Norkflow Help	
Reporting Add and customize forms to your records Accreditation Reports Activity Reports	← Home / Reporting Home Welcome to Reporting The difference between two or more report	t categories are displayed below. We believe these will be helpful i	n selecting the appropriate report you are looking for.
	Accreditation Reports	Activity Reports	
	Get access to different reports from several accreditation boards	Access detailed insights to all Activity Standard reports	

ENABLING PROXY EDITING SECTION

ENABLING PROXY:

- 1. Locate: The Proxy Editing Toggle and turn it on.
- 2. Use the drop-down menu: A drop-down menu will appear, listing the faculty members you have permission to proxy edit. Use the up and down arrow keys to navigate through the names.
- 3. Click: On the desired name to select it.





Proxy Editing 🜑	Smith, Ben 🗸	Þ			
Faculty Insigh	Slater, Robbie Slawson, Brian Slayton, William				
Search Activities	Sleeper, Meg Slepian, Zachary	mization Workflo	ow Help		All Gator V
Reporting Add and customize forms to your records	Sletova, Natalia Sley, Allison Slinger-Constant, Anne-Marie Slinn, Donald	me orting			
Accreditation Reports	Slivon, Rachel Slowey, Charlie Slutsky, Steven	o or more report catego	ries are displayed below. We belie	ve these will be helpful in selecting the ap	propriate report you are looking for.
Activity Reports	Small, Ian Small, Wood, Bryan Smith, Adam Smith, Adam Smith, Andrew Smith Barbara	line and a second se			
	Smith, Ben Smith, Brenda		Activity Reports		
	Get access to di from several a boar	fferent reports accreditation rds	Access detailed insights to all Activity Standard reports		

CONFIRMING PROXY EDITING SECTION

CONFIRMING PROXY EDITING MODE:

1. After selecting a faculty member: A message will confirm that you are now proxy editing as that individual.

NOTE: You will now have full access to the faculty member's profile.

Proxy Editing C Smith, Ben Vow editing Ben Smith. All changes saved automatically.						
Faculty Insight	BS) Ben Smith 🗸					
Home Search My Profile Activities Documents Reporting Workflow Welcome, Ben						
Complete Workflow Tasks Please complete these tasks as soon as possible.	Complete your Profile Keep your academic profile up-to-date by reviewing the below activities.					
	O Update your photo I'll do it later					
You're up to date! There are currently no tasks assigned to you.	 Update your Research Interests I'll do it later 					
Go to Workflow	O Update your Research 0% Summary I'll do it later					
	O Update your Research O Get Help					



MANAGING ACTIVITIES SECTION

MANAGING ACTIVITIES AS A PROXY:

1. **Once proxy editing is enabled:** Refer to other instructional guides (IGs) for managing specific activities in the activity manager on behalf of the selected faculty member <u>(See Navigation Guide)</u>.

Proxy Editing 🜑	Smith,	3en 👻 Now e	diting Ben Smith.	All changes save	ed automatically	ι.							
Faculty Insig	;ht											į	BS Ben Smith 🗸
Home Search	My Profile	Activities	Documents	Reporting	Workflow	Help							
Activity Manage	er 🤆	÷	ager										
Awards & Honors	^	Welcome to	the Activity	/ page									
Awards & Honors		The forms on this Analytics curates	page are provideo certain scholarshi	l for faculty to se p data for faculty	If-report their ac	ccomplisi	nments. In som lated records fo	e cases, your in: or you. Thank yo	stitution may l	be providing da	ata on your b w your data	oehalf. Addition	nally, Academic Iditional
Career	~	information/feed	back.	,	,,			. ,			,,		
Clinical Activities	~												
Creative Works	~								-				
Scholarship	~					_		(~~~~	50				
Service	~												
Teaching & Mentoring	~												

EXITING PROXY SECTION

EXITING PROXY EDITING MODE:

- 1. To stop proxy editing: Log out or switch back to your original user profile as needed.
- 2. **NOTE:** If you leave the Proxy Editing toggle on, it will impact your view of the platform. Remember to



UF Human Resources



FOR ADDITIONAL ASSISTANCE

Policies & General Questions

Office of the Provost | Academic and Faculty Affairs <u>UF-FEA@ufl.edu</u>

Technical Issues Academic Analytics <u>facultyinsightproductquality@academicanalytics.com</u>