



Using Proxy

September, 2019

Add a Proxy

- ▶ If you will be away from the office for an extended period of time, you have the ability to add someone, from your organization as a Proxy. By proxying in as you, they will have the ability to complete work on your behalf.
- ▶ In order to add a user as a Proxy they MUST currently have access to OAKS CI
- ▶ When someone Proxy's in as you, they can do work on your behalf, however, they will not have access to change your password and there will be an audit trail of all transactional work they perform on your behalf

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- ▶ To add someone as a Proxy:
 - ▶ (a) Click your name in the upper right hand corner
 - ▶ (b) Click Preferences
 - ▶ (c) Click Proxy
 - ▶ (d) Click the + under, Users who can act as my Proxy

The screenshot shows a web application interface. In the top right corner, the user's name 'shauna hooks' is visible, with a dropdown menu containing 'Get Under Mobile App...', 'Preferences', 'Last login: 08/21/2018 08:22 AM', and 'Sign Out'. A blue arrow labeled 'a' points to the user's name. Below the name, the 'Preferences' link is highlighted, with a blue arrow labeled 'b' pointing to it. The 'Preferences' dialog box is open, showing the 'Proxy' tab selected, with a blue arrow labeled 'c' pointing to it. In the 'Users who can act as my Proxy' section, there is a '+' button, with a blue arrow labeled 'd' pointing to it. The main window displays a dashboard with a pie chart and a list of business processes.

Add a Proxy

- ▶ (a) Click the Select button next to Grant Proxy Access To*
- ▶ (b) Select the person you would like to grant Proxy access
- ▶ (c) Click Select

Proxy User [Close]

Proxy User Settings

Grant Proxy Access To * [Select] (a)

Start Date/Time
MM/DD/YYYY HH:MM AM

End Date/Time
MM/DD/YYYY HH:MM AM

Status
 Inactive Active

Cancel OK

User Picker [Close]

Search | Find on Page

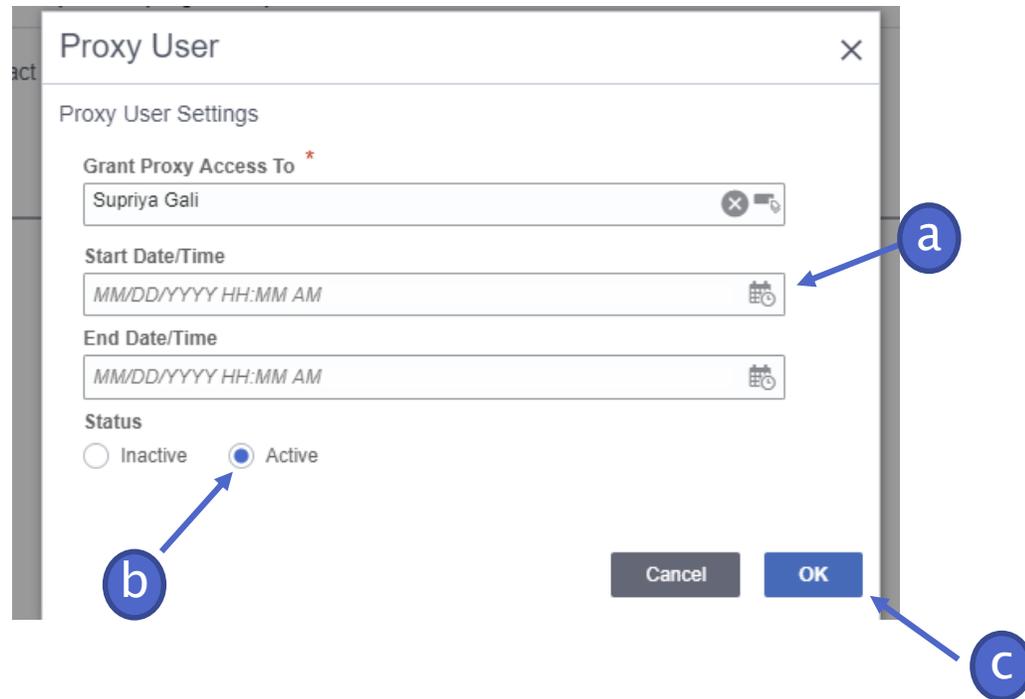
Name	First Name	Last Name	Company	E-Mail
OE OSU External CM	OSU	External CM	State of Ohio	yu.195@osu.edu
MF MUN Facility Contracting ...	MUN	Facility Contracting Offi...	State of Ohio	xxx@das.state.oh.us
RF Richard Feldmiller	Richard	Feldmiller	State of Ohio	rfeldmiller@ysu.edu
MF MUN Finance & Business...	MUN	Finance & Business Se...	State of Ohio	xxx@das.state.oh.us
CF CLS Fiscal	CLS	Fiscal	State of Ohio	xxx@das.state.oh.us
OF OSU Fiscal Officer	OSU	Fiscal Officer	State of Ohio	sosa.7@osu.edu
CF Cyndi Fout	Cyndi	Fout	State of Ohio	fout.9@osu.edu
AF Anne Frost	Anne	Frost	State of Ohio	anne.frost@ofcc.ohio.gov
WF WSU Fund Manager	WSU	Fund Manager	State of Ohio	xxx@das.state.oh.us
OF OSU Funding Manager	OSU	Funding Manager	State of Ohio	sosa.7@osu.edu
SG Supriya Gali	Supriya	Gali	State of Ohio	supriya.gali@ofcc.ohio...
SG Shiva Gannerla	Shiva	Gannerla	State of Ohio	shiva.gannerla@ofcc.o...
SG SAO General Contractor	SAO	General Contractor	State of Ohio	xxx@das.state.oh.us
UG UC General Council	UC	General Council	State of Ohio	xxx@uc.edu
BO Brett Gundlach	Brett	Gundlach	State of Ohio	brett.gundlach@ofcc.oh...
RL Rhonda Hagemeyer	Rhonda	Hagemeyer	State of Ohio	rhonda.hagemeyer@of...

Total: 310

Cancel Select (c)

Add a Proxy

- ▶ (a) You have the option to choose and start and end period
- ▶ (b) Or you may simply set them to Active
- ▶ (c) Click OK



The screenshot shows a dialog box titled "Proxy User" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Grant Proxy Access To ***: A text input field containing "Supriya Gali" with a clear (X) and help (?) icon on the right.
- Start Date/Time**: A date and time picker field showing "MM/DD/YYYY HH:MM AM" with a calendar icon on the right.
- End Date/Time**: A date and time picker field showing "MM/DD/YYYY HH:MM AM" with a calendar icon on the right.
- Status**: Two radio buttons, "Inactive" and "Active". The "Active" radio button is selected.
- Buttons**: "Cancel" and "OK" buttons at the bottom right.

Annotations are present:

- A blue circle with the letter "a" has an arrow pointing to the "Start Date/Time" field.
- A blue circle with the letter "b" has an arrow pointing to the "Active" radio button.
- A blue circle with the letter "c" has an arrow pointing to the "OK" button.

Proxy in as a User

- ▶ Proxy in as another OAKS CI user:
 - ▶ Log into OAKS CI using your username and password
 - ▶ (a) Click your name in the upper right hand corner
 - ▶ (b) Click Proxy For – Choose Person

The screenshot displays the OAKS CI web application interface. In the top right corner, the user's name 'Sara Freetage' is visible. A dropdown menu is open, showing options: 'Get Unifier Mobile App', 'Preferences', 'Proxy For', and 'Last login: 08/28/2018 02:23 PM'. A blue arrow labeled 'a' points to the user's name, and another blue arrow labeled 'b' points to the 'Proxy For' option. The main content area shows a 'Workflow Business Processes' section with a table of business processes. A pie chart on the left indicates 562 items, with a legend for 'Late' (red), 'Not Started' (yellow), and 'In Progress' (green).

Business Process	0	0	2
Design Reviews	25	0	0
Meeting Minutes	0	0	1
Professional Services Agreements	0	6	3
Professional Services Amendments	0	4	0
Professional Services Pay Request	0	15	1

Questions?

Please contact OAKS CI Support Desk:

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