

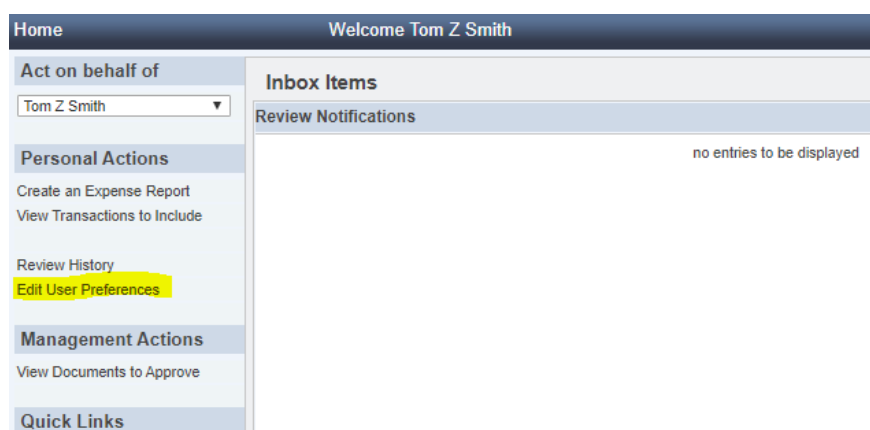
## SumTotal Proxy Assignment

Setting up a proxy to approve expense claims on your behalf

If you will be away and unable to approve expense claims, you should temporarily assign someone to approve expense claims on your behalf. This can be set up on the “Proxies” tab, but we recommend contacting Financial Services for assistance and advice as to who should be your proxy approver.

- The proxy approver must be an equivalent or higher level of authority, following the one-over-one hierarchy.
- The proxy approver should understand the claims that they are approving.
- Once you set up your proxy approver, you will not be able to see the history of any claims that have been approved by your proxy approver.

To access the “Proxies” tab, click on “Edit User Preferences” found under Personal Actions” on the Welcome screen.



Home Welcome Tom Z Smith

Act on behalf of  
Tom Z Smith

**Personal Actions**

- Create an Expense Report
- View Transactions to Include
- Review History
- Edit User Preferences**

**Management Actions**

- View Documents to Approve

**Quick Links**

**Inbox Items**

Review Notifications

no entries to be displayed

- Click on the arrow beside “Approver” and search for the employee you want as your proxy approver.

Define Proxies

Proxy User Name	Start Date	End Date
Submitter Joe J Johnson	01/01/20	
Submitter		
Submitter		
Submitter		
Submitter		
Submitter		
Submitter		
Submitter		
Submitter		
Submitter		

Clear

Approver

Proxy for

- Click on their name to populate the field.
- Click on the calendar beside start date to choose the start date.
- Click on the calendar beside ‘End Date’ to end the proxy
- “Save” and “Close”.