Setting up a Proxy in Banner Workflow

Users can set up a proxy in Banner Workflow when they are away for a short period of time (ex. vacation). The proxy will be sent all notifications and be responsible for the Role while the User is away. *It is not appropriate to set up a proxy as a “second” approver.* If you would like to make changes to the roles users have, please contact FGSR.

The person chosen as proxy must have the same Role (ie GS_Coordinator) as the User adding the proxy.

1. Log in to Banner Workflow [https://banner.uregina.ca:8888/wfprod/logon.jsp](https://banner.uregina.ca:8888/wfprod/logon.jsp)
2. Click on “User Information” on the left hand side.
3. Beside the appropriate Role Name (ex. GS_Coordinator) click on the blue “Add Proxy”. Some users have various roles within workflow. Please be sure that you choose the appropriate Role Name for the proxy. If you would like to set up a proxy for more than one role you will need to add it separately to each Role.
4. Select the User you would like to add as proxy from the drop down box. This list is not of full names but of Banner user names so you may need to get this information from the person you are adding as proxy.
5. “Effective From” date defaults to the current date and can be changed if needed. An end date is also to be entered in the “Effective To” field.
6. Select “Non-Confidential” (this is a required field).
7. Save