



**Overview & Objective** – The purpose of this O M & U is to provide guidance on Entering as a Proxy. An Administrator can select a user to proxy as (“slide-in” as) in order to make changes on behalf of that user.

**Note:** As presented, these procedures do not necessarily fit the business rules/requirements of every company using OpenAir. In addition, certain terminology presented provides only a sampling of possible names that could be applied.

**Initial Navigation** – Navigation for each function is listed separately below.

**GRANTING PROXY RIGHTS** – This procedure allows an Administrator to grant themselves proxy rights.

1. Go to the Applications dropdown (upper right hand corner)
  2. Select the Professional Service Automation Module
  3. Go to Activities dropdown (upper left hand corner)
  4. Select the Activity “Dashboard”
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- I. Click on the <Account> tab
  - II. Click the “Users” link in the Account Data grouping
  - III. Drill down on the specific User to provide proxy rights for –usually the User that’s currently logged in (I.E. If logged in as the Administrator, “Michelle” I would drill down on my OWN user name, “Michelle”).
  - IV. Click on the <<Proxy>> sub-tab
  - V. Select the **Proxied User Name** and **User Role**. Multiple assignments or proxies are allowed.
    - **Note:** If the *incorrect User Role* is selected from the dropdown (a Role inconsistent with the Role actually assigned to the user) a distorted view of the user’s session will follow (VIZ. the proxy session will appear differently from the actual user’s experience).

⇒ Click, “Save.” This completes the procedure for granting proxy rights.

**ENTERING AS THE PROXIED USER** – This procedure outlines entry as a Proxied User. That is, proxying in as another user.

1. Go to the Applications dropdown (upper right hand corner)
  2. Select the Professional Service Automation Module
  3. Go to Activities dropdown (upper left hand corner)
  4. Select the Activity “Dashboard”
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- I. Click on the <My Options> tab
  - II. Click on the <<Proxy>> sub-tab
  - III. Any Users for whom proxied rights have been assigned for should appear on the Name list
  - IV. Click on any named Proxy User
- ⇒ This will allow access to the Proxied User’s session. The same rights and privileges of this Proxied User will be available to the Administrative User. This will allow for entry or changes to the timesheets, expenses, etc.

**Further Instruction & Use** – For further information regarding Entering as Proxied User contact your Account Executive or call The NDH Group, Ltd. at 312.461.0505.