

Assigning a Proxy

If a user will be temporarily unable to fulfill their tasks in PolicyStat because they are on a leave of absence or out of office for some other reason, a proxy can be assigned to handle those responsibilities for them.

To assign a proxy, first navigate to the Admin tab.

Click the Users link in the Site Data column.

Use the search bar or manually locate the user in need of a proxy, then click the corresponding Edit link.

Click the Proxy tab on their account page.

Begin typing a name in the proxy text box and select the desired user from the list.

Click the Save Changes button.

A proxy has now been assigned.

Users with a proxy will not be able to access PolicyStat while a proxy is assigned. When they are again able to take over their responsibilities, return to the Proxy tab while editing their account.

Click the X next to the name of the person serving as a proxy and then click the Save Changes button.

The proxy has been removed and the user can again login as normal.