

HOW TO ADD PROXY

TARGET AUDIENCE: *FACULTY*

Updated April 27, 2023

OVERVIEW

Adding a proxy(s) in the FHS DB is essentially assigning a delegate(s) who will be able to manage your CV data on your behalf.

LOGIN TO FHS DB

Login to the system using your MacID/password or local login.

If you have any questions about how to login, refer to this user guide on our website [How to Login to FHS DB](#)

HOW TO ADD A PROXY

Select “Assign Proxy” on the left-hand drop-down menu.



You will be able to see who you have already assigned as a proxy under “Current Proxies.” You can search through your existing proxies using the search filter.



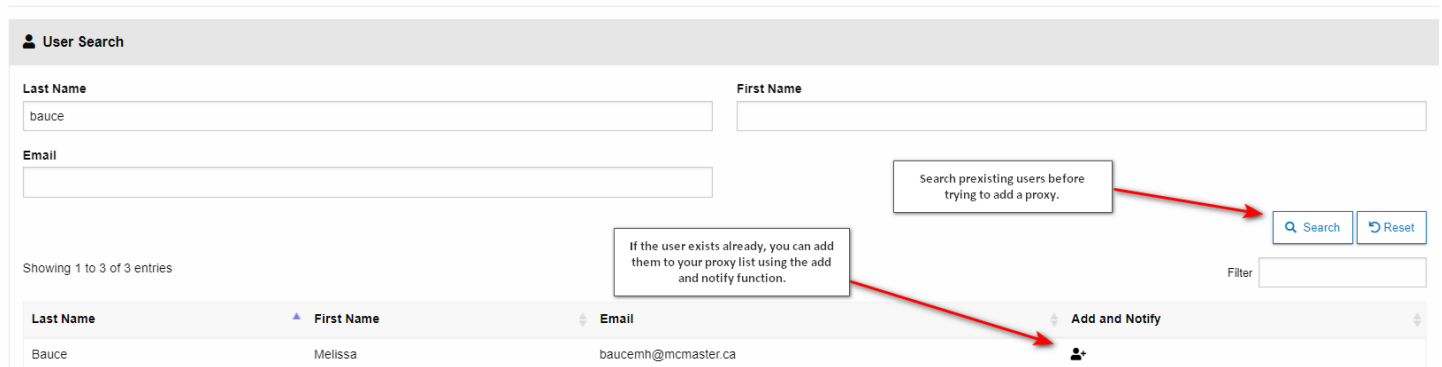
The screenshot shows a table titled "Current Proxies" with the following data:

Name	Email Address	Last Login
test 2 test	test2@mcmaster.ca	

Annotations: A callout box says "Can search through existing proxies that you have added." with an arrow pointing to the "Filter" input field. The table shows "Showing 1 to 1 of 1 entries" and "Show 25 entries".

If you wish to add a proxy to your current proxy list, you will need to search the database first to see if the user exists. You can search by the users first name, last name, or email address. It is recommended you search by name as users may be in the database with a different email than expected.

If the user already exists in the system, select the icon under “Add and Notify.” This will add the proxy to your current proxies list and notify the user that they now have the ability to manager your CV data in the FHS DB.




The screenshot shows a "User Search" form with the following data:

Last Name: First Name:

Email:

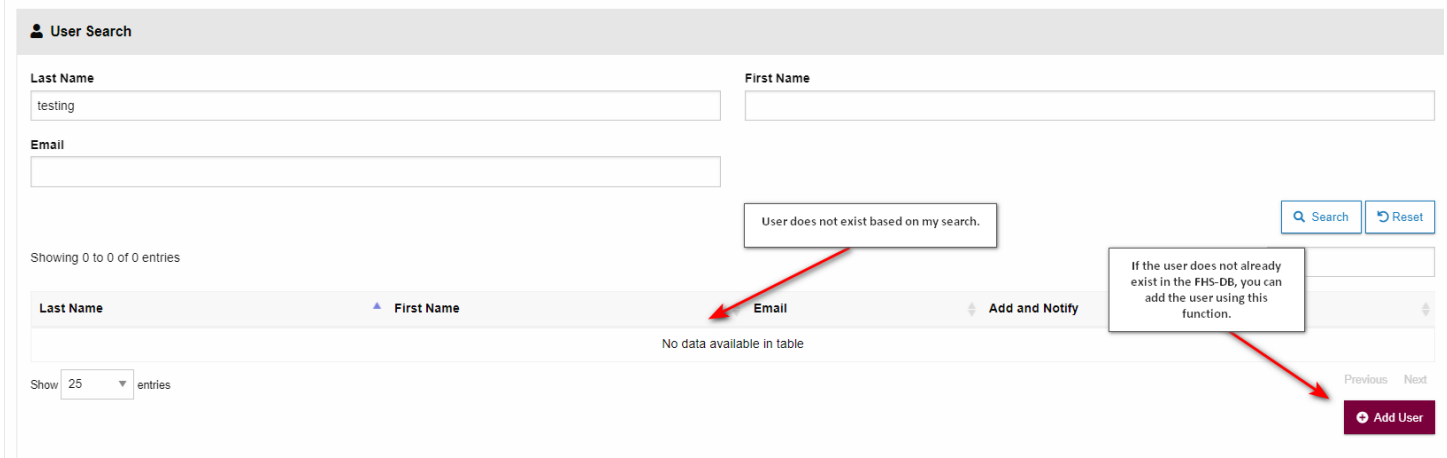
Buttons: Search, Reset

Results table:

Last Name	First Name	Email	Add and Notify
Bauce	Melissa	baucemh@mcmaster.ca	

Annotations: A callout box says "Search preexisting users before trying to add a proxy." with an arrow pointing to the Search button. Another callout box says "If the user exists already, you can add them to your proxy list using the add and notify function." with an arrow pointing to the Add and Notify icon in the table.

If the user does not already exist in the FHS-DB, you will see the “Add User” icon appear. This will only appear if you have already searched through existing users.



User Search

Last Name: testing

First Name:

Email:

Showing 0 to 0 of 0 entries

Last Name	First Name	Email	Add and Notify
No data available in table			

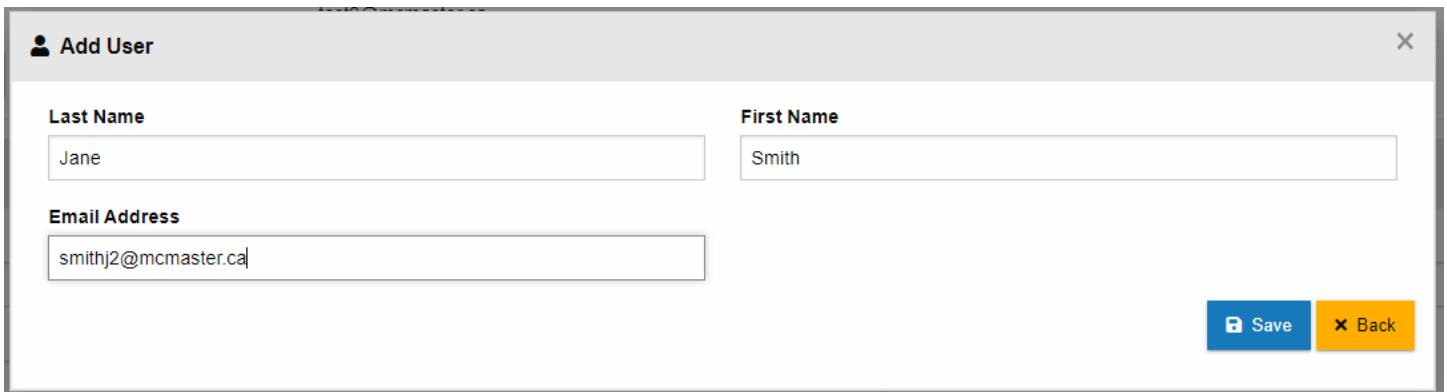
Show 25 entries

Search Reset

Previous Next

Add User

To add a new user, you will need to select the “Add User” icon and provide the last name, first name, and email address. Please use proper case when adding a new user’s name (ex. Jane Smith = proper case, jane smith = not proper case). It is recommended to provide a McMaster email address (if applicable) when adding a new user. Once you have added their information select save.



Add User

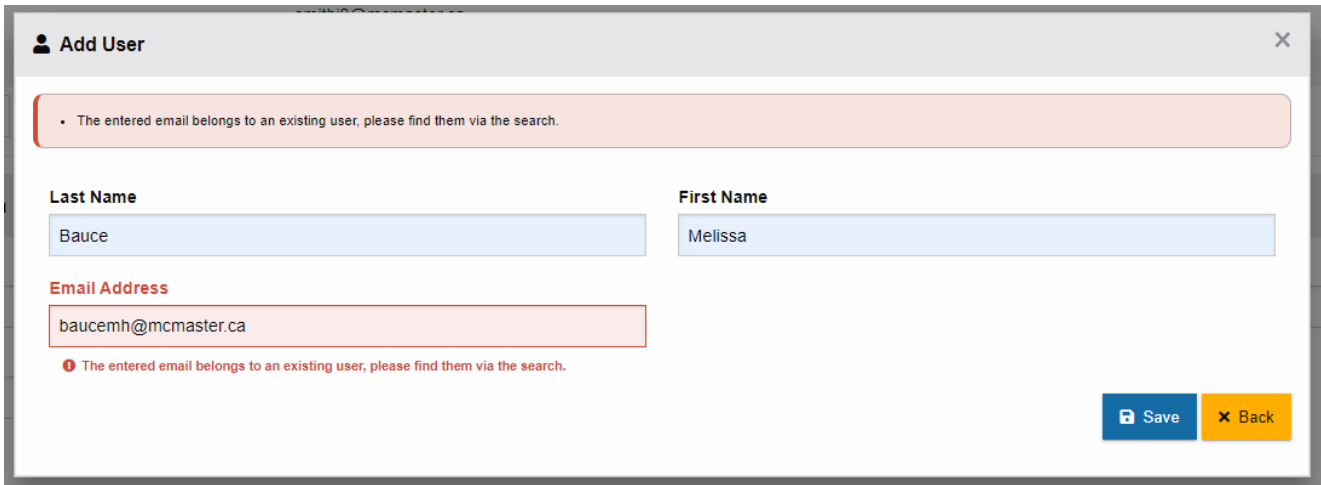
Last Name: Jane

First Name: Smith

Email Address: smithj2@mcmaster.ca

Save Back

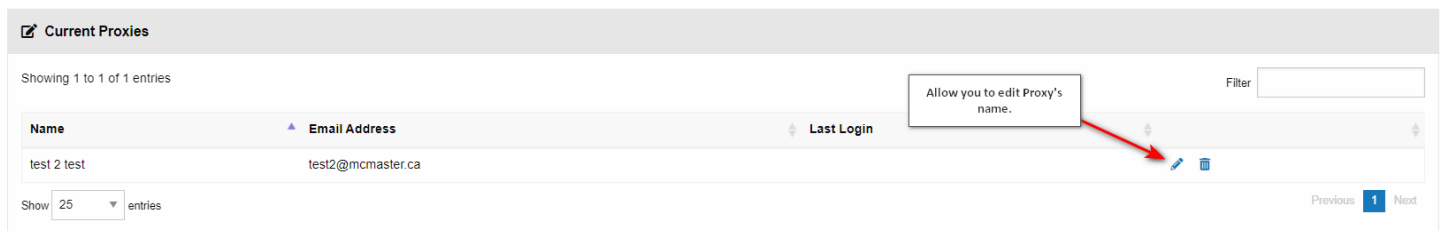
If the user already exists in the system based on the information you have provided you will get the following warning message. You will need to use the user search function to find the pre-existing user.



If you wish to remove a proxy that no longer needs access to manage your CV data, you can delete them from the current proxies list using the garbage icon.



If you spelt the proxy's name incorrectly or used improper cases, you can use the edit function to correct it.



BEST PRACTICES

- Please try to keep your proxy list up to date.
- Always search for pre-existing users before adding a proxy.
- If a proxy has a McMaster email address, please use that email address when adding new users.
- Remember that proxy access allows a delegate to update/add information for your entire CV.

NEED SUPPORT?

All FHS DB User Guides can be found on the [FHS DB website](#)