

# Instructions to Assign a Proxy in Huron

Research Security and Export Controls Office  
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## Navigation and Basic Tasks (Dashboard)

To log in, please click [here](#) or copy and paste the following link in your web browser to log in using your SSO credentials:  
<https://tamu.huronresearchsuite.com/>

When you first log in, you will be on your Dashboard, which is the starting point for finding items and performing many basic tasks.

The screenshot shows a web dashboard with a top navigation bar containing 'Dashboard', 'Admin', 'COI', and 'Settings'. The 'Dashboard' tab is highlighted with a red circle. Below the navigation bar, there are tabs for 'My Inbox' and 'My Reviews'. The 'My Inbox' section features a search bar and a table of items. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. Two items are listed: a Disclosure Profile and a TEST item. A sidebar on the left shows 'Recently Viewed' items, including a Disclosure Profile and a BOR Approval. The bottom of the table shows '2 items' and pagination controls for 'page 1 of 1' with a '25 / page' setting.

ID	Name	Date Created	Date Modified	State	Coordinator
DP00000267	Disclosure Profile	12/18/2021 2:35 AM	5/24/2022 8:34 AM	Action Required	
EXE00000002	TEST	5/16/2022 2:42 PM	5/16/2022 2:42 PM	Pre-Submission	

## To find key items

From your Dashboard, you will see:

**My Inbox:** Items that require you to take action.

**My Reviews:** Items assigned to you to review if you are a reviewer. These are a subset of the items in “My Inbox”.

### Recently Viewed:

**Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.

**Pinned:** You can pin the items in the Recently Viewed section for quick and easy access. This is where those pinned items are listed.

**Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.

Dashboard | Admin | COI | Settings

Page for Help

My Inbox | My Reviews

**Recently Viewed**

Recent | Pinned

DP00000267: Disclosure P.

EXE00000009: BOR Approval

COI Central Administration: COI Central Actions

**My Inbox**

Filter by ID  + Add Filter × Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
DP00000267	Disclosure Profile	12/18/2021 2:35 AM	5/24/2022 8:34 AM	Action Required	
EXE00000002	TEST	5/16/2022 2:42 PM	5/16/2022 2:42 PM	Pre-Submission	

2 items | page 1 of 1 | 25 / page

+ Add Filter

▼ Date Modified | State | Coordinator

**Personalize Table**

**Displayed Fields**

Field	Order
<input checked="" type="checkbox"/> getIconAsLink	↑ ↓
<input checked="" type="checkbox"/> ID	↑ ↓
<input checked="" type="checkbox"/> Name	↑ ↓
<input checked="" type="checkbox"/> Date Created	↑ ↓
<input checked="" type="checkbox"/> Date Modified	↑ ↓
<input checked="" type="checkbox"/> State	↑ ↓
<input checked="" type="checkbox"/> Coordinator	↑ ↓

**Options**

Place the paging bar at: Bottom

Enable Auto-Refresh:

Refresh Data Every: 60 seconds

Export to CSV

## Introduction

This guide shows how to assign and remove a Proxy from your COI disclosure profile in Huron.

A **Proxy** is a person who is authorized to act on behalf of the discloser.

**NOTE**: An assigned Proxy may enter necessary information in a **Disclosure Profile** (on behalf of the discloser). However, the Proxy is not allowed to submit the **Certification** of the disclosure. The **Certification** is an electronic certification which is automatically generated by Huron, requiring the discloser to confirm that the submitted disclosure information is accurate, current, and complete.

## Allow a Proxy to Disclose for You

A proxy is a person who is authorized to act for a discloser.

The proxy can perform the following tasks for the discloser in Huron COI:

- View the COI **Disclosure Profile** workspace, including **Management Plans, Pre-Approval Requests**, and disclosure summary table.
- View the **Instructions and Policies** page in the SmartForm.
- Edit the **Entity Disclosure Information** page in the SmartForm.
- **Assign** and **Remove** proxy assignments for the discloser.
- **Notify the discloser** when the proxy has completed the updates.

However, the **discloser** must do the following tasks personally. The proxy cannot:

- **Submit Disclosures**
- **Submit Certifications** related to submitted Disclosures.
- **Review and Certify** COI training completion.
- **Respond to a Clarification Request.**
- **Review and Accept** Conflict of Interest Management Plans.

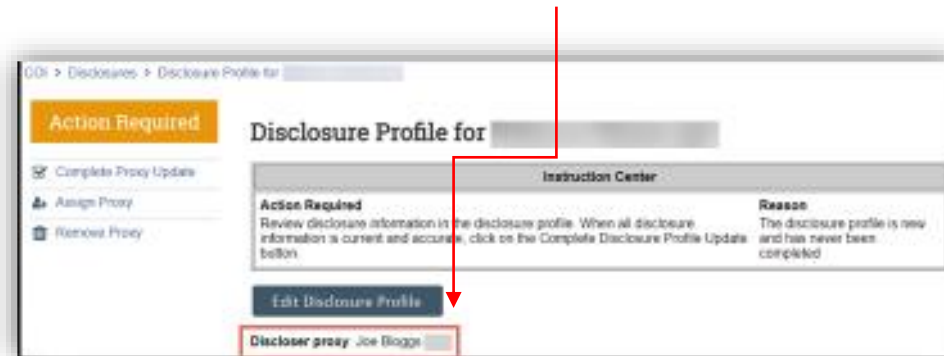
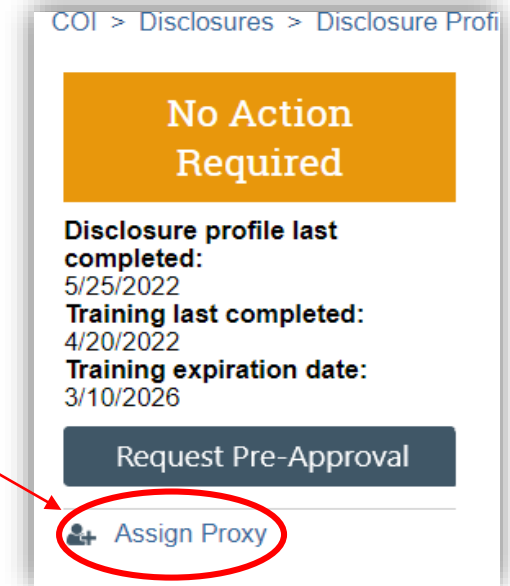
## Assign a Proxy

The **Assign Proxy** activity is used to add a new proxy assignment or change it to someone else.

1. Log in the Huron system using SSO, and click on your **Discloser Profile**
2. On the disclosure workspace, click **Assign Proxy**.
3. Select the proxy using one of the following methods:
  - a. In the Discloser proxy box, start typing the name of the proxy, and select the person's name from the list of results. Click **OK**.
  - b. Click the ellipsis (...) button, select the proxy from the list and click OK. You can also use the filtering tools to search for a person.

**Note:** The proxy receives an e-mail notification about the assignment, and the Disclosure Profile appears in the proxy's inbox. The Proxy can now perform tasks on behalf of the discloser.

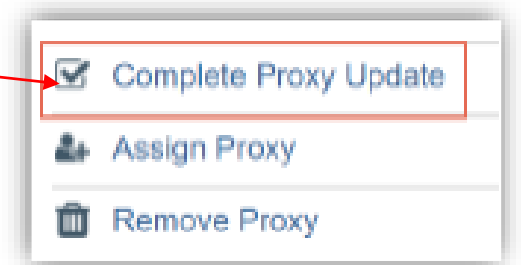
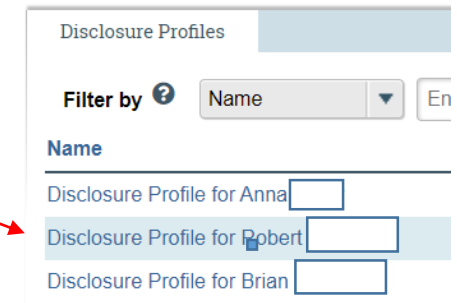
After a proxy is assigned to the discloser, the proxy's name is displayed in the workspace.



## Complete the Proxy Update

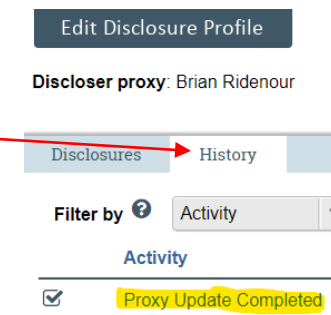
If you are assigned as Proxy, follow these steps:

1. Log in the Huron system using **SSO**.
2. Under the **COI** tab, click on the link for the specific **Discloser Profile** for which you want to complete the proxy update.
3. If the discloser has something to disclose, Click on **Edit Disclosure Profile** and enter the related information.
4. After you have entered all the relevant information, or if the discloser does not have anything to disclose, Click **Complete Proxy Update**.
5. If required, enter comments and upload supporting documents.
6. Click **OK**.
7. The discloser receives an e-mail notification that the proxy has completed the updates. The discloser needs to review the updates done by the proxy and then complete and submit the discloser profile update.



**Note:** The proxy details appear in the **History** tab of the disclosure profile.

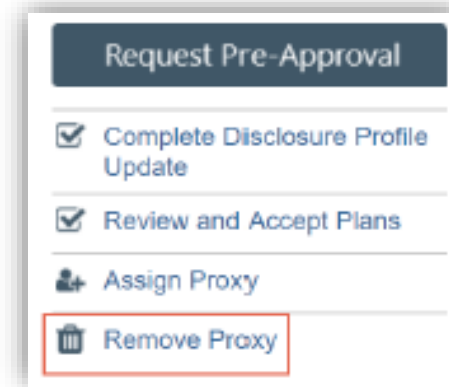
Just below the state of the disclosure profile, the discloser can see the date on which proxy completed the latest update.



## Remove the Assigned Proxy

The Remove Proxy activity is used to remove the proxy assignment from the discloser's profile. After executing this activity, the proxy will no longer have access to the discloser's profile.

1. On the disclosure workspace, click Remove Proxy.
2. Click OK to remove the assigned proxy.



**Note:** The proxy receives an email notification about the removal, and the discloser profile disappears from the proxy's inbox. Then the proxy can no longer perform tasks on behalf of the discloser.