



Authorizing a Proxy for an Employee Overview

Proxies are users in Cardinal Expenses who are authorized to enter expense transactions in Cardinal for a specified employee (including themselves). Once users are authorized in Cardinal as proxies and assigned the appropriate authorization level, they can enter and update Travel Authorizations, Cash Advances, and Expense Reports on behalf of the specified employee(s). Each employee requiring travel or expense reimbursements must have at least one proxy authorized to enter and submit expense transactions. Employees can have multiple proxies.

Proxies are also required for interfacing Agencies' employees, whose interfaced transactions may need online updates or corrections.

Adding proxies to employees in Cardinal is done by Cardinal Expense Processors.

Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Authorizing a Proxy

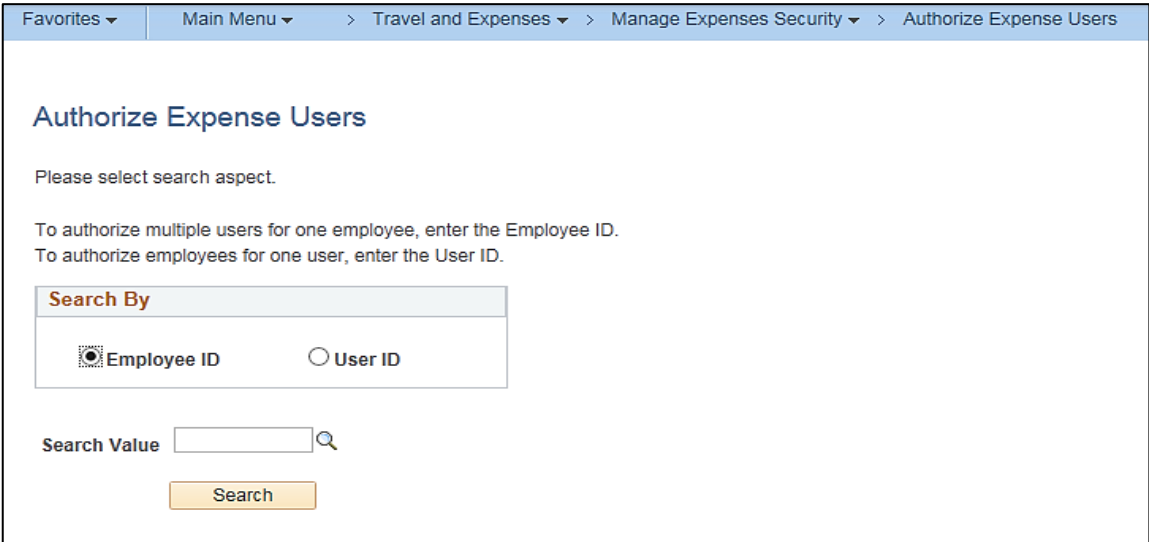



There are two ways to authorize a proxy for an employee:

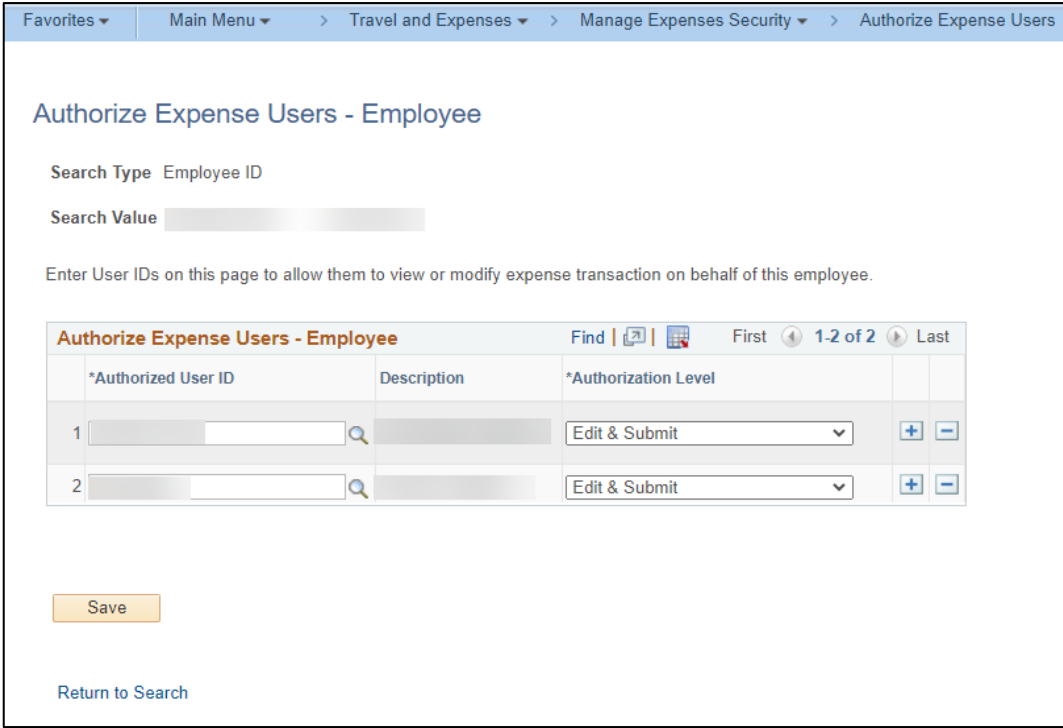



- [Employee ID](#): Use this option to enter the specific employee ID and add one or more proxies for that employee.
- [User ID](#): Use this option to enter the User ID for a specific person and add all the employees they will be a proxy for.

See the appropriate section of this Job Aid for the steps to enter information based on the options listed above.

Authorizing a Proxy using the Employee ID

Use this option to authorize an employee to be a Proxy for one or more employees.

Step	Action
1.	<p>Navigate to the Authorize Expense Users page using the following path: Main Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users</p> <p>The Authorize Expense Users page displays.</p> 
	<p>The Employee ID option defaults as selected. Do not change it.</p>
2.	<p>Enter or select the Employee ID in Search Value field.</p> 
3.	<p>Click the Search button.</p> 

Step	Action
	<p>The Authorize Expense Users – Employee page displays.</p> 
	If the employee is already a Proxy for an employee or multiple employees, they display on this page.
4.	<p>Click the (+) button to add a new blank row.</p> 
	To delete an existing Proxy, click the (-) button next to the name that needs to be deleted.



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Step	Action
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The new row displays.

Favorites ▾

Main Menu ▾

>

Travel and Expenses ▾

>

Manage Expenses Security ▾

>

Authorize Expense Users

Authorize Expense Users - Employee

Search Type

Employee ID

Search Value

Enter User IDs on this page to allow them to view or modify expense transaction on behalf of this employee.

Authorize Expense Users - Employee			Find	First ◀	1-3 of 3	▶ Last
	*Authorized User ID	Description	*Authorization Level			
1	<div><div></div><div></div><div>🔍</div></div>	<div><div></div><div></div></div>	<div>Edit & Submit ▾</div>	<div>+ -</div>		
2	<div><div></div><div></div><div>🔍</div></div>	<div><div></div><div></div></div>	<div>Edit & Submit ▾</div>	<div>+ -</div>		
3	<div><div></div><div></div><div>🔍</div></div>	<div><div></div><div></div></div>	<div>Edit & Submit ▾</div>	<div>+ -</div>		

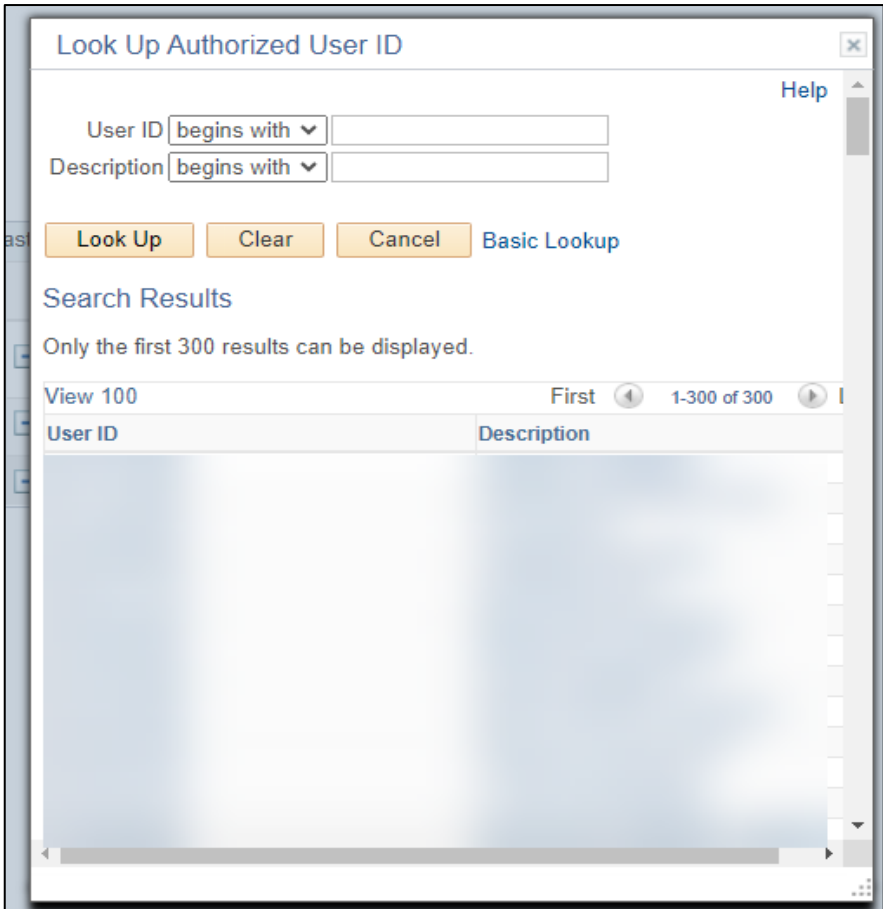


Save

Return to Search

- Click the **Authorized User ID Look Up** icon.

3

🔍

Step	Action
	<p>The Look Up Authorized User ID page displays in a pop-up window.</p> 
	<p>Use the User ID or Description options to search for the specific employee.</p> <ul style="list-style-type: none"> • User ID: This option allows the user to search using the employee's Cardinal User ID • Description: This option allows the user to search by using the last name of the employee
6.	<p>Select the employee from the list.</p> 

Step	Action
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The selected employee displays in the new row.

Favorites ▾

Main Menu ▾

>

Travel and Expenses ▾

>

Manage Expenses Security ▾

>

Authorize Expense Users

Authorize Expense Users - Employee



Search Type



Employee ID

Search Value

Enter User IDs on this page to allow them to view or modify expense transaction on behalf of this employee.

Authorize Expense Users - Employee


Find |  


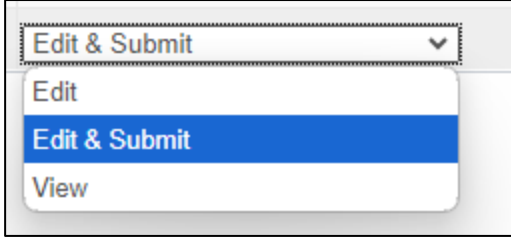

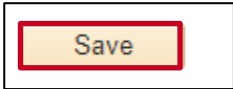

First  1-3 of 3  Last

	*Authorized User ID	Description	*Authorization Level		
1	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div>Edit & Submit</div>	<div>+</div>	<div>-</div>
2	<div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div></div>	<div>Edit & Submit</div>	<div>+</div>	<div>-</div>
3	<div><div></div><div></div><div></div></div>	<div>DOE, JOHN</div>	<div>Edit & Submit</div>	<div>+</div>	<div>-</div>

Save

Return to Search

	The Authorization Level field defaults to “Edit & Submit”.
7.	<p>Select the Proxy’s authorization level for the employee in the Authorization Level field by clicking the dropdown menu and selecting the applicable authorization level.</p> <div> <div>Edit & Submit</div> <div>▼</div> </div>

Step	Action
	<p>There are three options to choose from:</p>  <ul style="list-style-type: none"> • Edit: Allows the Proxy to view, create, and edit a transaction for the employee. When this option is selected, the Submit button is unavailable for expense related transactions • Edit & Submit: Allows the Proxy to view, create, delete, cancel, edit, and submit all expense related transactions for the employee • View: Allows the Proxy to view only the transactions created by an employee. If this Authorization Level is selected, the Employee ID field in the Create/Modify Search page is unavailable. The Save and the Add buttons are also unavailable. The Proxy cannot delete, modify, or add new transactions
8	<p>Verify that the appropriate value has been selected. For this scenario, the default value of “Edit & Submit” is applicable.</p> 
9.	To authorize additional Proxies, repeat Steps 4-8.
10.	<p>After all Proxies have been added, click the Save button.</p> 
	<p>The added Proxy(ies)/authorized user(s) can now handle transactions for the employee based on the Authorization Level assigned.</p>

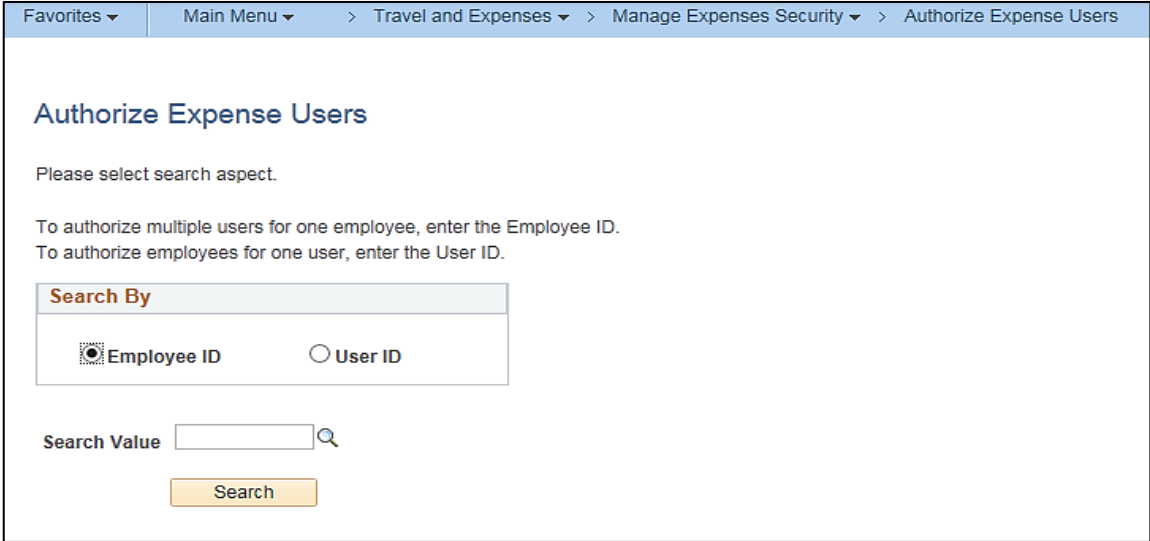
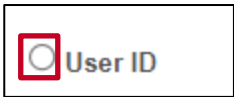




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AP315_Authorizing a Proxy for an Employee

Authorizing a Proxy using the User ID

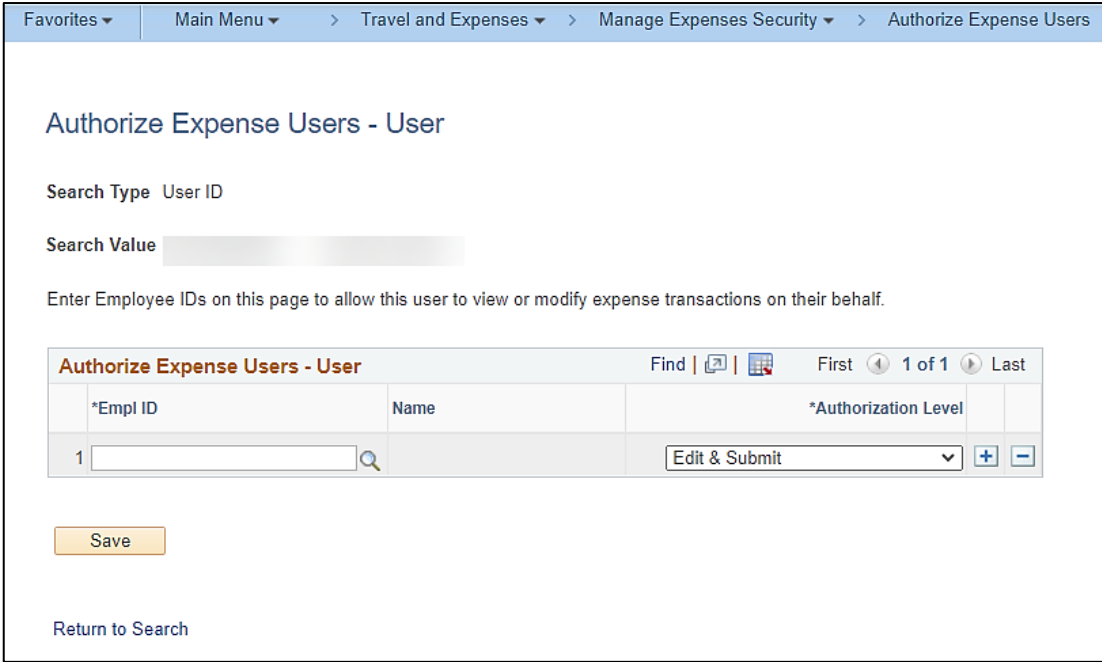

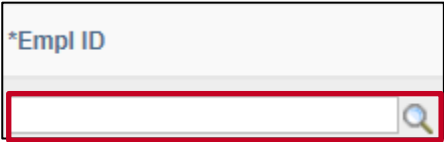


Use this option when you want to authorize an employee to be authorized user/proxy for multiple employees.


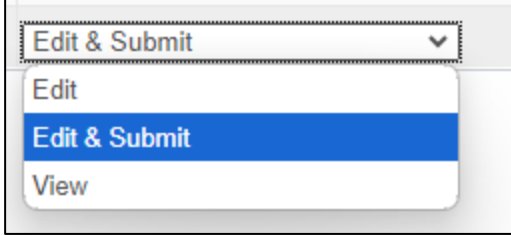

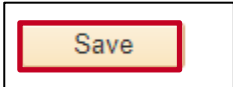

Step	Action
1.	Navigate to the Authorize Expense Users page using the following path: Main Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users
The Authorize Expense Users page displays.	
	
2.	Select the User ID indicator. 
3.	Click the Search button. 
4.	Enter or select the User ID in the Search Value field. 



Accounts Payable Job Aid

AP315_Authorizing a Proxy for an Employee

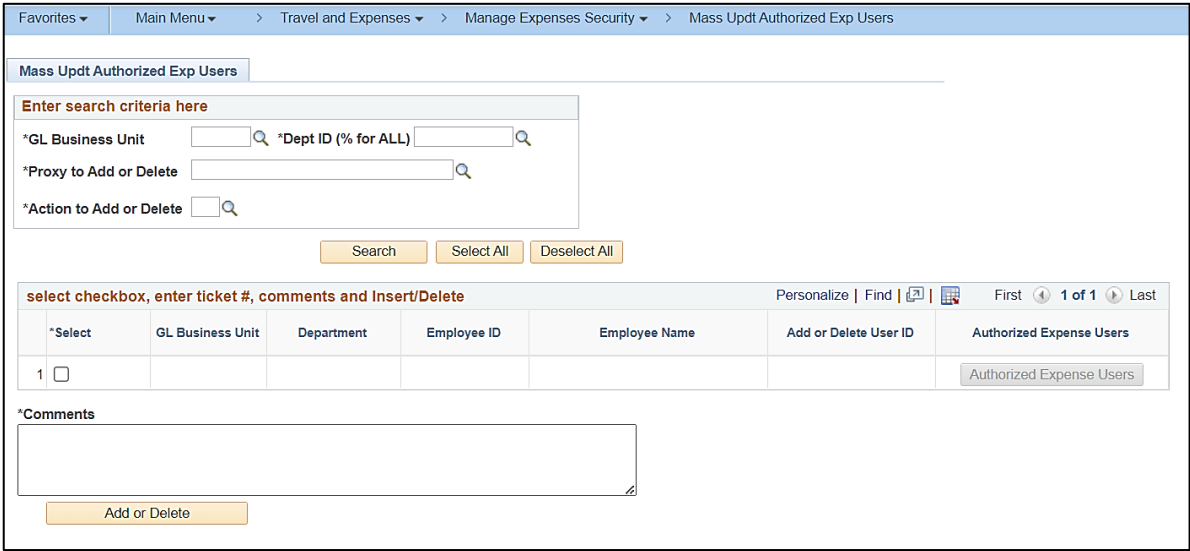




Step	Action
	<p>The Authorize Expense Users – User page displays.</p> 
	<p>If there are employees that the user is currently a Proxy for, click the (+) button to add a new row. For this scenario, the employee does not have any existing employees' proxies. To delete an existing Proxy, click the (-) button next to the name that needs to be deleted.</p>
5.	<p>Enter or select the Employee ID in the Empl ID field.</p> 
6.	<p>Once the Employee ID is entered or selected, the Name field populates. Verify that this is the appropriate employee.</p> 
7.	<p>Select the Proxy's authorization level for the employee in the Authorization Level field by clicking the dropdown menu.</p> 

Step	Action
	<p>There are three options to choose from:</p>  <ul style="list-style-type: none"> • Edit: Allows the Proxy to view, create, and edit a transaction for the employee. When this option is selected, the Submit button is unavailable for expense related transactions • Edit & Submit: Allows the Proxy to view, create, delete, cancel, edit, and submit all expense related transactions for the employee • View: Allows the Proxy to view only the transactions created by an employee. If this Authorization Level is selected, the Employee ID field in the Create/Modify search page is unavailable. The Save and the Add buttons are also unavailable. The proxy cannot delete, modify, or add new transactions
8	<p>Verify that the appropriate value has been selected. For this scenario, the default value of “Edit & Submit” is applicable.</p> 
9.	<p>To authorize additional expense users for the Proxy, click the (+) button and repeat the steps to search for and add the expense user, and then select the Proxy’s Authorization Level for each expense user.</p>
10.	<p>After all Proxies have been added, click the Save button.</p> 
	<p>The added Proxy can now handle transactions for the employee(s) assigned based on the Authorization Level that was selected.</p>



Completing a Mass Update of Authorized Expense Users



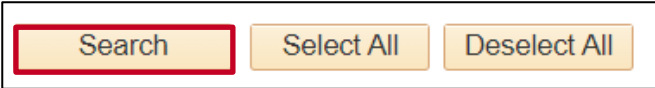
The **Mass Updt Authorized Exp Users** page is used to add or delete an authorized user/Proxy for multiple employees. When this page is used to add a Proxy, the Proxy will automatically be set up with the ability to edit and submit on behalf of the employees selected.

Step	Action
1.	<p>Navigate to the Mass Updt Authorized Exp Users page using the following path:</p> <p>Main Menu > Travel and Expenses > Manage Expenses Security > Mass Updt Authorized users</p>
<p>The Mass Updt Authorized Exp Users page displays.</p> 	
2.	<p>Enter the Business Unit in the GL Business Unit field.</p> 
3.	<p>Enter or select a specific Department in the Dept ID (% for ALL) field.</p> 
	<p>To select all Departments, enter the “%” symbol in this field. For this scenario, a specific Department is entered.</p>
4.	<p>In the Proxy to Add or Delete field, enter, or select the User ID of the person being added or deleted.</p> 

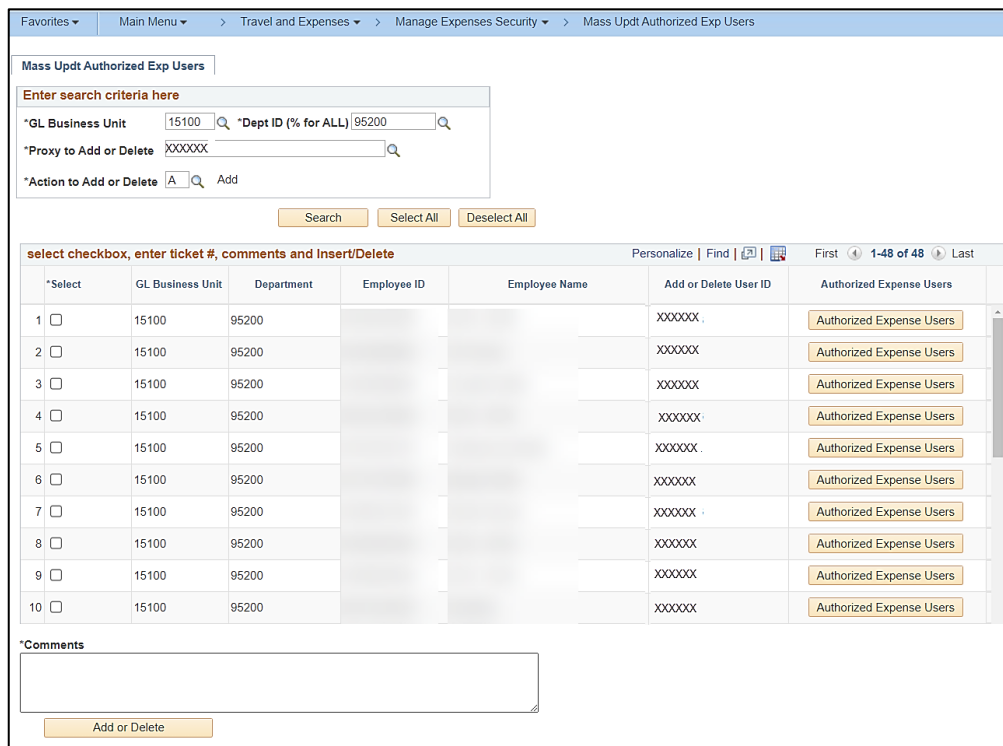


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AP315_Authorizing a Proxy for an Employee

Step	Action
	For this example, we are adding a proxy for multiple employees.
5.	Enter or select “A” to add, or “D” to delete a Proxy in the Action to Add or Delete field using the Look Up icon. 
6.	For this scenario, “A” is selected.
7.	Click the Search button. 

The **Search Results** display at the bottom of the page.




The screenshot shows the 'Mass Updt Authorized Exp Users' page. At the top, there are navigation tabs: Favorites, Main Menu, Travel and Expenses, Manage Expenses Security, and Mass Updt Authorized Exp Users. Below the tabs, there is a search section with the following fields:

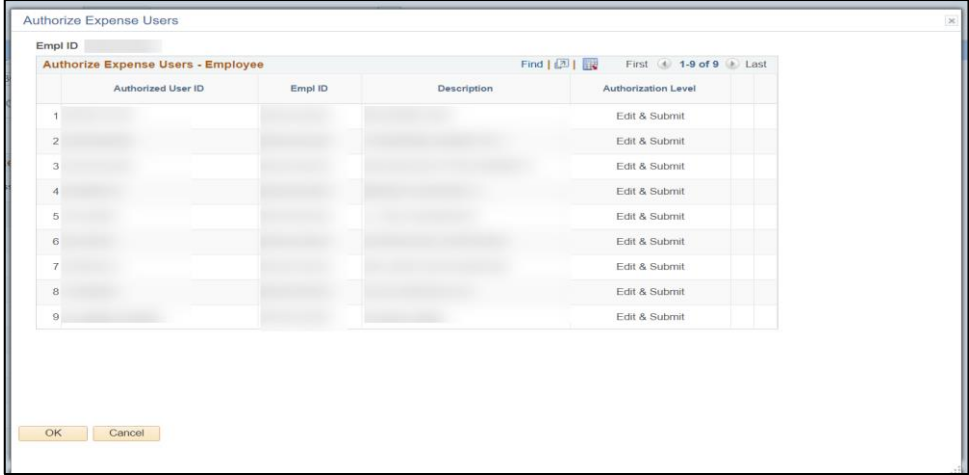


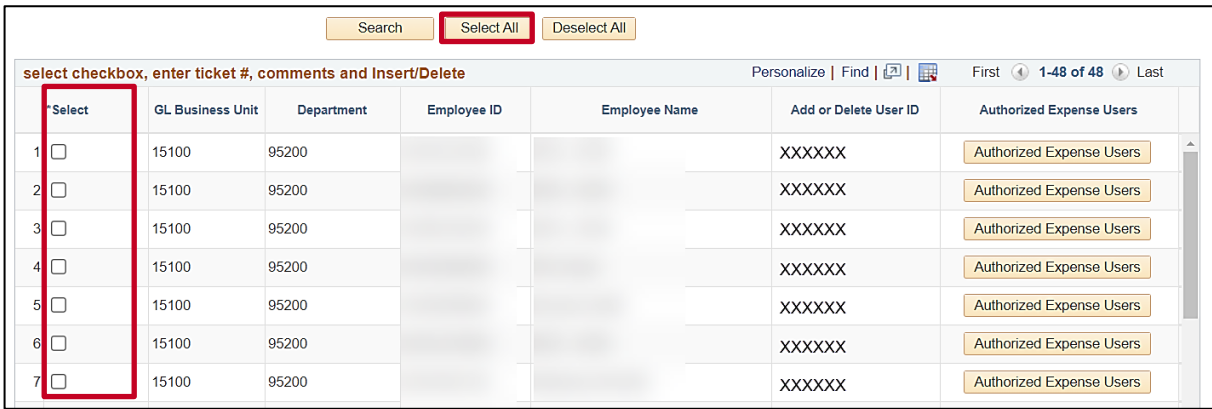

- *GL Business Unit: 15100
- *Dept ID (% for ALL): 95200
- *Proxy to Add or Delete: XXXXXX
- *Action to Add or Delete: A

Below the search fields are three buttons: Search, Select All, and Deselect All. The main table displays search results with the following columns:

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
1 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
2 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
3 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
4 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
5 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
6 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
7 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
8 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
9 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users
10 <input type="checkbox"/>	15100	95200			XXXXXX	Authorized Expense Users

Below the table, there is a section for comments with a text area and an 'Add or Delete' button.

8.	To see a list of current authorized users for a specific employee, click the Authorized Expense Users button next to the employee. 
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Step	Action
	<p>The Authorize Expense Users page displays in a pop-up window.</p> 
	<p>This allows the user to view all current authorized users and what they are authorized to do for that user, which is listed under the Authorization Level column.</p>
9.	<p>Click the OK button to return.</p> 
10.	<p>Select the employees that the Proxy is being added for by clicking the corresponding Select checkbox option(s).</p> 
	<p>Use the Select All button to select everyone that displays. The user must use the scroll bar to scroll down the page to view all the employees that display on the list.</p> <p>If the selected Proxy is already set up, the user does not need to uncheck the Select checkbox option as no updates will occur. Cardinal only updates if the Proxy differs from what the employee already has set up in the system.</p>



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AP315_Authorizing a Proxy for an Employee

Step

Action

11.



After selecting the appropriate employees, enter notes as to the reason for the addition or deletion of a Proxy in the **Comments** field.

Search

Select All

Deselect All

select checkbox, enter ticket #, comments and Insert/Delete

Personalize | Find |   First 1-48 of 48 Last

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
1 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
2 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
3 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
4 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
5 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
6 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
7 <input checked="" type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>

*Comments

Add or Delete

12.

Click the **Add or Delete** button.

Add or Delete



The page refreshes.

Search

Select All

Deselect All

select checkbox, enter ticket #, comments and Insert/Delete

Personalize | Find |   First 1-48 of 48 Last

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
1 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
2 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
3 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
4 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
5 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
6 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>
7 <input type="checkbox"/>	15100	95200			XXXXXX	<div>Authorized Expense Users</div>

*Comments

Employee will handle travel entry for this entire department per Fiscal Officer, Paper Clip.

Add or Delete

i

The **Select** checkbox option(s) are cleared.

The Proxy has been added to any account selected where the Proxy had not been set up previously.