

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 there may be 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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Accounts Payable Job Aid

AP315_Authorizing a Proxy for an Employee

Revision History

Revision Date	Summary of Changes
10/23/2024	Baseline





Authorizing a Proxy

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

- <u>Employee ID</u>: Use this option to enter the specific employee ID and add one or more proxies for that employee.
- <u>User ID</u>: 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.	Navigate to the Authorize Expense Users page using the following path:					
	Main Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users					
The Au	thorize Expense Users page displays.					
	Favorites ▼ Main Menu ▼ > Travel and Expenses ▼ > Manage Expenses Security ▼ > Authorize Expense Users					
	Authorize Expense Users					
	Please select search aspect.					
	To authorize multiple users for one employee, enter the Employee ID. To authorize employees for one user, enter the User ID.					
	Search By					
	Employee ID OUser ID					
	Search Value					
	Search					
j	The Employee ID option defaults as selected. Do not change it.					
2.	Enter or select the Employee ID in Search Value field.					
	Search Value					
3.	Click the Search button.					
	Search					



Step	Action					
The Au	Ithorize E	Expen	se Users –	Employee pa	page displays.	
	Favor	ites 🕶	Main Menu 🕶	> Travel and Exp	xpenses - > Manage Expenses Security - > Authorize Expense Users	
	Au	thorize	Expense Us	sers - Employe	/ee	
	Se	arch Typ	e Employee ID			
	56	arch Valu	16			
	En	ter User II)s on this page to al	low them to view or m	modify expense transaction on behalf of this employee.	
	A	uthorize	Expense Users	- Employee	Find [🔄 🛛 🙀 First 🕢 1-2 of 2 🕟 Last	
		*Author	rized User ID	Description	on *Authorization Level	
		1		Q	Edit & Submit 🗸 🛨 🖃	
		2		Q	Edit & Submit 🗸	
	R	Save Return to S	iearch			
i	If the en page.	nploye	e is already	a Proxy for a	an employee or multiple employees, they display on this	
4.	Click the	∍ (+) b	utton to add	l a new blank	k row.	
	+ -					
i	To delet	e an e	xisting Pro	ky, click the (-	(-) button next to the name that needs to be deleted.	



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Step	Action
The Lo	ook Up Authorized User ID page displays in a pop-up window.
	Look Up Authorized User ID User ID begins with Description begins with Look Up Clear Cancel Basic Lookup Search Results Only the first 300 results can be displayed. View 100 User ID Description User ID Description
i	Use the User ID or Description options to search for the specific employee.
	 Description: This option allows the user to search by using the last name of the employee
6.	Select the employee from the list.
	Doe, John



Step	Action						
The se	lected empl	loyee displays	in the new row.				
	Favorites 🕶	Main Menu 🗸	> Travel and Expenses -	> Manage Expense	es Security 🔹 > Au	thorize Exper	ise Users
	Authorize Search Typ Search Val	e Expense Us e Employee ID ue	ers - Employee				
	Enter User I	Ds on this page to all	ow them to view or modify ex	Find	half of this employee.	● Last	
	*Autho	rized User ID	Description	*Authorization Leve	4		
	1		Q	Edit & Submit	~	+ -	
	2		Q	Edit & Submit	~	+ -	
	3		Q DOE, JOHN	Edit & Submit	~	+ -	
	Save Return to S	Search					
i	The Autho	prization Level	field defaults to "E	dit & Submit".			
7.	Select the clicking th	Proxy's authors e dropdown m	prization level for th nenu and selecting	e employee in t the applicable a	he Authorizati uthorization lev	i on Leve vel.	I field by
	Edit & S	ubmit	~				



Step	Action				
6	There are three options to choose from:				
C	Edit & Submit View				
	 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	Verify that the appropriate value has been selected. For this scenario, the default value of "Edit & Submit" is applicable.				
	Edit & Submit				
9.	To authorize additional Proxies, repeat Steps 4-8.				
10.	After all Proxies have been added, click the Save button.				
	Save				
i	The added Proxy(ies)/authorized user(s) can now handle transactions for the employee based on the Authorization Level assigned.				



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 Au	thorize Expense Users page displays.
	Favorites • Main Menu • > Travel and Expenses • > Manage Expenses Security • > Authorize Expense Users
	Authorize Expense Users Please select search aspect.
	To authorize multiple users for one employee, enter the Employee ID. To authorize employees for one user, enter the User ID.
	Search By
	Employee ID OUser ID
	Search Value Search
2.	Select the User ID indicator.
	O User ID
3.	Click the Search button.
	Search
4.	Enter or select the User ID in the Search Value field.
	Search Value



Step	Action				
The Au	The Authorize Expense Users – User page displays.				
	Favorites 🕶	Main Menu 🗸	> Travel and Expenses	➡ → Manage Expenses Security ➡ → Authorize Expense Users	
	Authori	ze Expense U	sers - User		
	Search Ty	be User ID			
	Search Val	ue			
	Enter Empl	oyee IDs on this page	to allow this user to view or	modify expense transactions on their behalf.	
	Authoriz	ze Expense Users ·	- User	Find 🔄 🇱 🛛 First 🕢 1 of 1 🕢 Last	
	*Empl	ID	Name	*Authorization Level	
	1		<u>a</u>	Edit & Submit	
	Save				
	Return to	Search			
	If there are	employees the	at the user is curr	ently a Proxy for, click the (+) button to add a new	
	row. For thi	s scenario, th	e employee does	not have any existing employees' proxies.	
	To delete ar	n existing Pro	xy, click the (-) bu	tton next to the name that needs to be deleted.	
5.	Enter or sele	ect the Emplo	yee ID in the Em	ol ID field.	
	*Empl ID				
			Q		
6.	Once the Er	nployee ID is	entered or select	ed, the Name field populates. Verify that this is the	
		empioyee.			
	Name				
	JOHN DOE				
7	Soloct the F			a amplayee in the Authorization Loval field by	
7.	clicking the	dropdown me	nu.		
	Edit 0 Cub	mit			
	Eait & Sub	mit	~		



Step	Action
1	 There are three options to choose from: Edit & Submit Edit & Submit Edit & Submit Edit & Submit View 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	Verify that the appropriate value has been selected. For this scenario, the default value of "Edit & Submit" is applicable.
9.	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.
10.	After all Proxies have been added, click the Save button.
i	The added Proxy can now handle transactions for the employee(s) assigned based on the Authorization Level that was selected.



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.	Navigate to the Mass Updt Authorized Exp Users page using the following path: Main Menu > Travel and Expenses > Manage Expenses Security > Mass Updt Authorized					
	users					
The Ma	ass Updt Authorized Exp Users page displays.					
	Favorites Main Menu Travel and Expenses Manage Expenses Security Mass Updt Authorized Exp Users					
	Mass Updt Authorized Exp Users					
	Enter search criteria here					
	*GL Business Unit Q *Dept ID (% for ALL)					
	*Proxy to Add or Delete					
	*Action to Add or Delete					
	Search Select All Deselect All					
	select checkbox, enter ticket #, comments and Insert/Delete Personalize Find 🔄 🔜 First 🕢 1 of 1 🕟 Last					
	*Select GL Business Unit Department Employee ID Employee Name Add or Delete User ID Authorized Expense Users					
	1 Authorized Expense Users					
	*Comments					
	Add or Delete					
l						
2.	Enter the Business Unit in the GL Business Unit field.					
	*GL Business Unit					
3.	Enter or select a specific Department in the Dept ID (% for ALL) field.					
	*Dept ID (% for ALL)					
	To select all Departments, enter the "%" symbol in this field.					
	For this scenario, a specific Department is entered					
4.	In the Proxy to Add or Delete field, enter, or select the User ID of the person being added or					
	*Proxy to Add or Delete					



Step	Action
İ	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.
	*Action to Add or Delete
6.	For this scenario, "A" is selected.
7.	Click the Searc h button.
	Search Select All Deselect All
The Se	arch Results display at the bottom of the page.
	Favorites • Main Menu • > Travel and Expenses • > Manage Expenses Security • > Mass Updt Authorized Exp Users Mass Updt Authorized Exp Users • <

1		15100	95200		XXXXXX	Authorized Expense Users	
2		15100	95200		XXXXXXXX	Authorized Expense Users	
3		15100	95200		XXXXXXX	Authorized Expense Users	
4		15100	95200		XXXXXXX	Authorized Expense Users	
5		15100	95200		XXXXXXX .	Authorized Expense Users	
6		15100	95200		XXXXXXXX	Authorized Expense Users	
7	0	15100	95200		XXXXXXXX +	Authorized Expense Users	
8		15100	95200		XXXXXXXX	Authorized Expense Users	
9		15100	95200		XXXXXXXX	Authorized Expense Users	
10		15100	95200		XXXXXXX	Authorized Expense Users	
Cor	nments						
_							

8.

To see a list of current authorized users for a specific employee, click the **Authorized Expense Users** button next to the employee.

Authorized Expense Users



Step	Action						
The Au	Ithorize	Expense Use	rs page di	splays in a p	oop-up window		
The Au	Ithorize	Expense User Empl ID Authorize Expense User Authorize Expense User 1 2 3 4 5 6 7 8 9	••Employee	Descrip	Find [23] First (Find [23] First (Find [23] First (Edit & Sut Edit & Sut Edit & Sut Edit & Sut Edit & Sut Edit & Sut	1-9 of 9 Last Level 1 omit 2 omit 3 omit 3	
		OK Cancel					.4
İ	This all that us	lows the user t er, which is list	o view all o ed under t	current auth he Authori z	orized users ar zation Level co	nd what they are plumn.	authorized to do for
9.	Click th	ne OK button to	o return.				
	(OK Ca	ancel				
10.	Select	the employees	that the P	roxy is bein	g added for by	clicking the corr	esponding Select
			Searc	h Select All	Deselect All		
	select o	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Lisers
		15100	05200	Linpioyee ib	Linpeyee raine		
		15100	95200			*****	Authorized Expose Llsors
	3	15100	95200			*****	Authorized Expense Users
	4	15100	95200				Authorized Expense Users
	5	15100	95200			*****	Authorized Expense Users
	6	15100	95200			*****	Authorized Expense Users
	7	15100	95200			****	Authorized Expense Users
i	Use the scroll d	e Select All bu lown the page	utton to sel to view all	ect everyon the employ	e that displays. ees that display	The user must on the list.	use the scroll bar to
	If the second se	elected Proxy as no updates vee already ha	is already : will occur. s set up in	set up, the ι Cardinal o the system.	user does not n nly updates if tl	eed to uncheck he Proxy differs	the Select checkbox from what the



Search Select All Deselect All select checkbox, enter ticket #, comments and Insert/Delete Personalize Find [2]	First	Select All Deselect All Personalize Find [2] [2] First & 1-48 of 48 & Last Add or Delete User ID Authorized Expense Users S100 95200 Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXX Authorized Expense Users XXXXXX Authorized Expense Users S100 95200 XXXXXX Authorized Expense Users XXXXXX Authorized Expense Users
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Search Select All Deselect All		
ct checkbox, enter ticket #, comments and Insert/Delete Personalize Find 🖉 🔡	First 🕢 1-48 of 48 🕑 I	i <mark>cket #, comments and Insert/Delete</mark> Personalize Find 🔄 🧱 First 🕢 1-48 of 48 🕢
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