

About Authorizing Proxies

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.

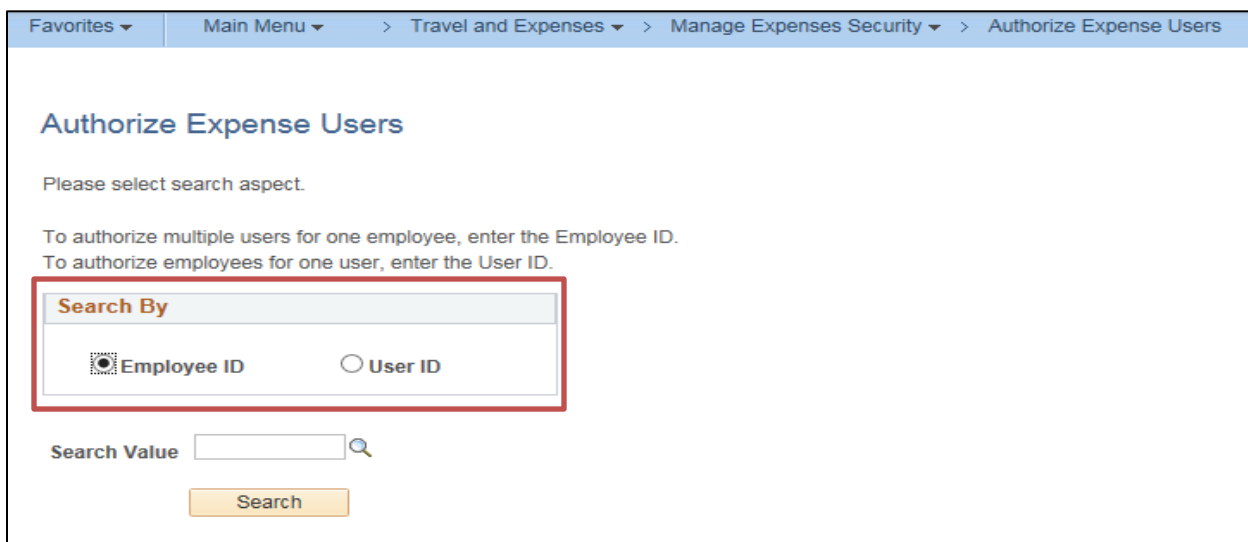
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Authorize a Proxy for an Employee:

- 1 Navigate to the **Authorize Expense Users** page using the following path:

Main Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users

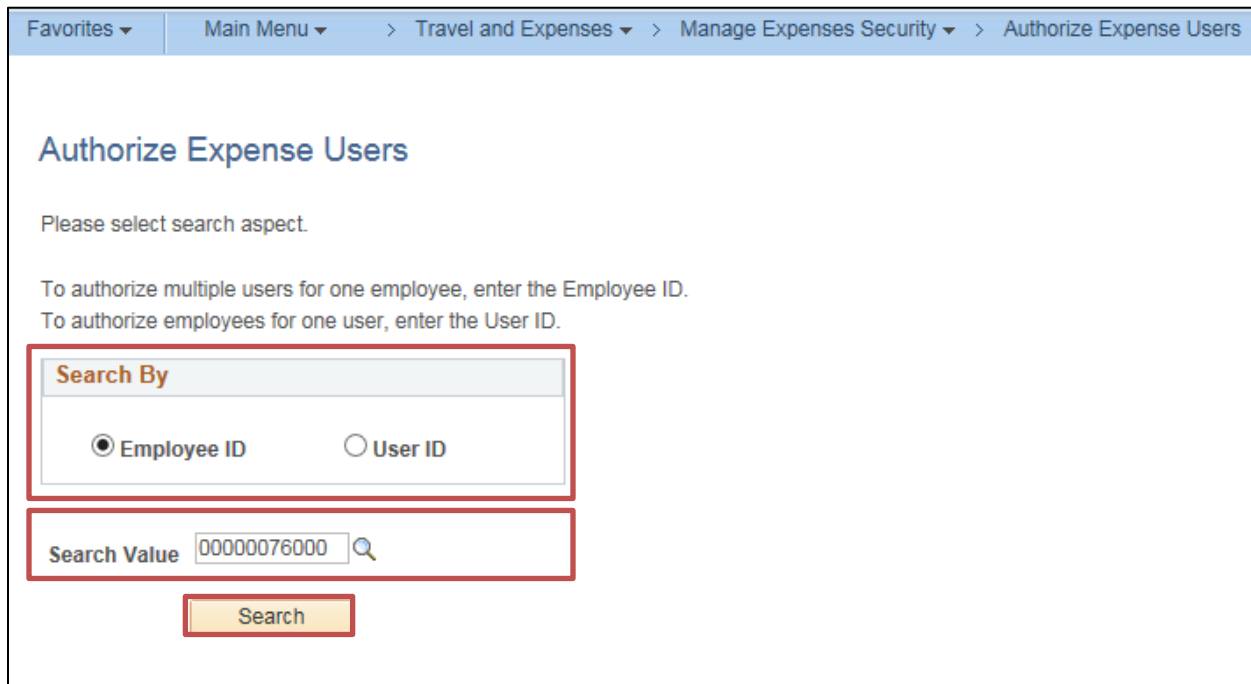


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- 2 There are two ways to search once you access this page:
 - a. **Employee ID:** Use this option to enter the specific employee ID and add one or more proxies for that employee.
 - b. **User ID:** Use this option to enter the User ID for a specific person and add all the employees they will be a proxy for.

Note: See the appropriate section of this job aid for steps to enter information based on the options listed above.

Search By Employee ID (Add Proxy / Proxies for an Employee):



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 User ID

Search Value: 00000076000

Search

- 1 To add a proxy / proxies for a specific employee, click the **Employee ID** option in the **Search By** section of the page.
- 2 In the **Search Value** field, enter the **Employee ID** (HR ID). Click the **Search** button.


















Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users

Authorize Expense Users - Employee

Search Type Employee ID

Search Value 00000076000 T JONES

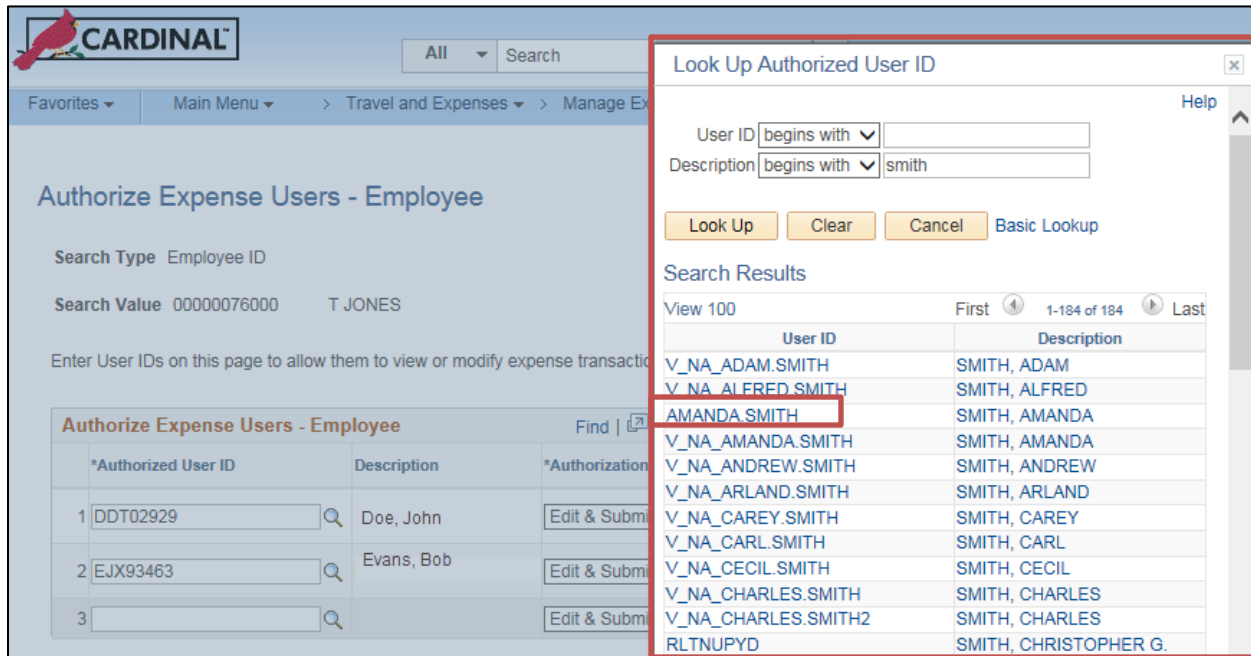
Enter User IDs on this page to allow them to view or modify expense transaction on behalf of this employee.

Authorize Expense Users - Employee			Find  	First 	1-3 of 3 	Last 
*Authorized User ID	Description	*Authorization Level				
1 <input type="text" value="DDT02929"/> 	Doe, John	Edit & Submit 				
2 <input type="text" value="EJX93463"/> 	Evans, Bob	Edit & Submit 				
3 <input type="text"/> 		Edit & Submit 				

[Return to Search](#)

- 3 The **Authorize Expense Users - Employee** page displays. To add a proxy, click the **+** (plus) button.
- 4 A new blank row displays.
- 5 Click the lookup icon.

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The screenshot shows the 'Authorize Expense Users - Employee' page in the CARDINAL system. A 'Look Up Authorized User ID' popup window is open, displaying search criteria and results. The search criteria are: User ID begins with (empty) and Description begins with smith. The search results list 184 employees with the last name SMITH. The entry 'AMANDA SMITH' is highlighted in the results list.

User ID	Description
V_NA_ADAM.SMITH	SMITH, ADAM
V_NA_ALFRED.SMITH	SMITH, ALFRED
AMANDA SMITH	SMITH, AMANDA
V_NA_AMANDA.SMITH	SMITH, AMANDA
V_NA_ANDREW.SMITH	SMITH, ANDREW
V_NA_ARLAND.SMITH	SMITH, ARLAND
V_NA_CAREY.SMITH	SMITH, CAREY
V_NA_CARL.SMITH	SMITH, CARL
V_NA_CECIL.SMITH	SMITH, CECIL
V_NA_CHARLES.SMITH	SMITH, CHARLES
V_NA_CHARLES.SMITH2	SMITH, CHARLES
RLTNUPYD	SMITH, CHRISTOPHER G.

- 6 The **Look Up Authorized User ID** popup box displays. Search for the proxy you want to add by entering one of the following:
 - a. **User ID:** This option allows you to search using the employee's Cardinal User ID.
 - b. **Description** – This option allows you to search by using the last name of the employee.
- 7 Click the name of the employee you want to add as a proxy.
- 8 If you do not know the **User ID**, click the **Advanced Lookup** link. A **Description** field displays on the **Look Up Authorized User ID** page.
- 9 Enter the full name, or use the **contains** lookup to enter a partial name. Click the **Look Up** button and search results display.
- 10 Search the listing and click the appropriate link under the **Description** column within the **Search Results** to select the proxy.
- 11 Verify that this is the intended proxy.
- 12 Click either the User ID or the name of the employee you want to add as a proxy.

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[Favorites](#) > [Main Menu](#) > [Travel and Expenses](#) > [Manage Expenses Security](#) > [Authorize Expense Users](#)

Authorize Expense Users - Employee

Search Type Employee ID
Search Value 00000076000 T JONES

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 DDT02929	Mulligan, Janet (VDH)	Edit & Submit				+ -
2 EJX93463	Powell, Laura W. (VDH)	Edit & Submit				+ -
3 AMANDA.SMITH	SMITH, AMANDA	Edit Edit & Submit View				+ -

[Return to Search](#)

- 13 Once you identify the proxy in the **Authorized User ID** column, select the proxy's **Authorization Level** for each employee listed in the column. The proxy will still require the proper security roles. There are three options to choose from:
 - a. **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 all expense related transactions.
 - b. **Edit & Submit:** Allows the proxy to view, create, delete, cancel, edit, and submit all expense related transactions for the employee.
 - c. **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.
- 14 To authorize additional proxies, click the **+** button and repeat the steps to search for, add, and select the Authorization Level for each proxy.
- 15 Click the **Save** button.
- 16 To delete an existing proxy, click the **-** button next to the **Name** of the proxy.

The added proxy(ies) / authorized user(s) can now handle transactions based on the authorization level assigned to them.

Search By User ID (Add User ID as Proxy to Employees):



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.

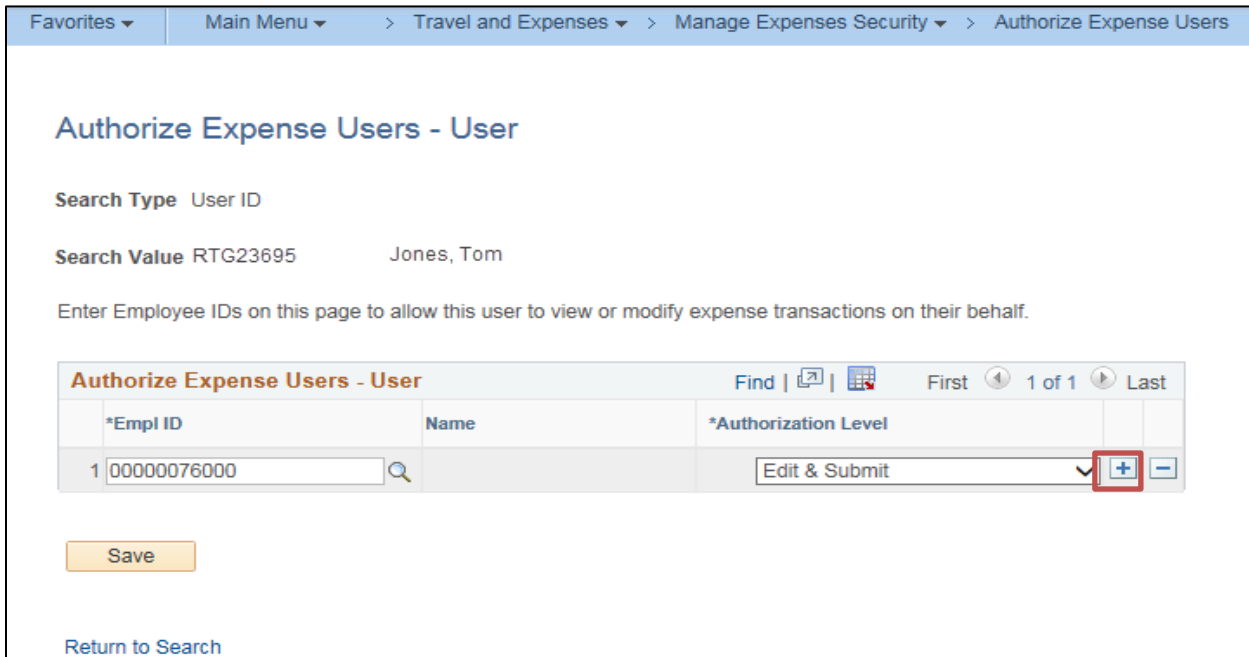
Search By

Employee ID User ID

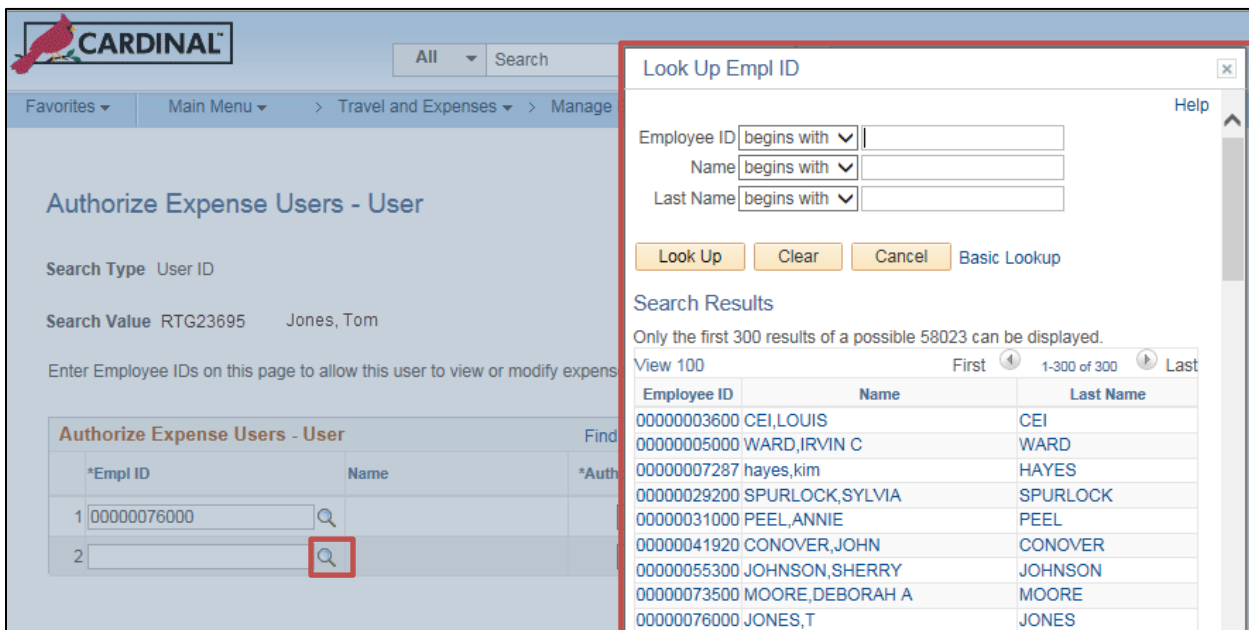
Search Value: RTG23695 

Search

- 1 From the **Authorize Expense Users** page:
 - a. Click the **User ID** option in the **Search By** section of the page.
 - b. In the **Search Value** field, enter or search for the employee User ID. If you need to look up the User ID, click the lookup icon.
 - c. Click the **Search** button.



- 2 The **Authorize Expense Users – User** page displays. This page allows you to enter employees that the selected user can be proxy for.
- 3 To add an employee, click the **+** (plus) button.



- 4 A new line displays. Enter or search for the **Empl ID** of the person you want to add under this proxy.
- 5 If you search, you can use **Employee ID**, **Name** or **Last Name** to find the employee.
- 6 Click the name of the employee you wish to add. You may need to use the scroll bar to see all the names that display for your search.

Favorites ▾ | Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Authorize Expense Users

Authorize Expense Users - User

Search Type User ID
 Search Value RTG23695 Jones, Tom

Enter Employee IDs on this page to allow this user to view or modify expense transactions on their behalf.

*Empl ID	Name	*Authorization Level		
1 00000076000		Edit & Submit Edit Edit & Submit View	+	-
2 00011913100	Rogers, Buck		+	-

Save

- 7 Once you add the employee under the proxy, assign the Authorization Level the proxy needs for that employee. The proxy will still require the proper security roles. There are three options to choose from:
 - a. **Edit:** Allows the proxy to view, create, and edit a transaction for the employee. When this option is selected, the Submit button is unavailable to the proxy for all expenses related transactions.
 - b. **Edit & Submit:** Allows the proxy to view, create, delete, cancel, edit, and submit all expense related transactions for the employee.
 - c. **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 and in the **My Wallet** page is not available. The **Save** and the **Add** buttons are also unavailable. The proxy cannot add, delete, or modify transactions for the employee.
- 8 To authorize additional expense users for this 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.
- 9 To delete an existing expense user from that proxy, click the **-** button next to the **Name** of the employee.