

Authorizing Proxies 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.

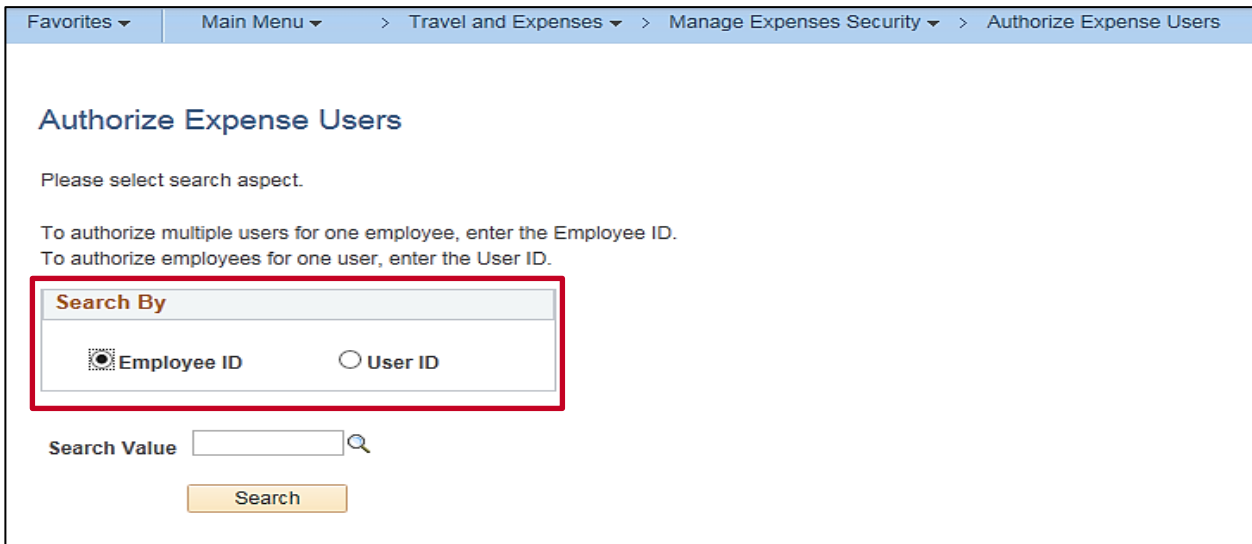
Table of Contents

Authorize a Proxy for an Employee	2
Search By Employee ID (Add Proxy/Proxies for an Employee)	3
Search By User ID (Add User ID as Proxy to Employees)	7
Mass Update of Authorized Expense Users	11

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



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

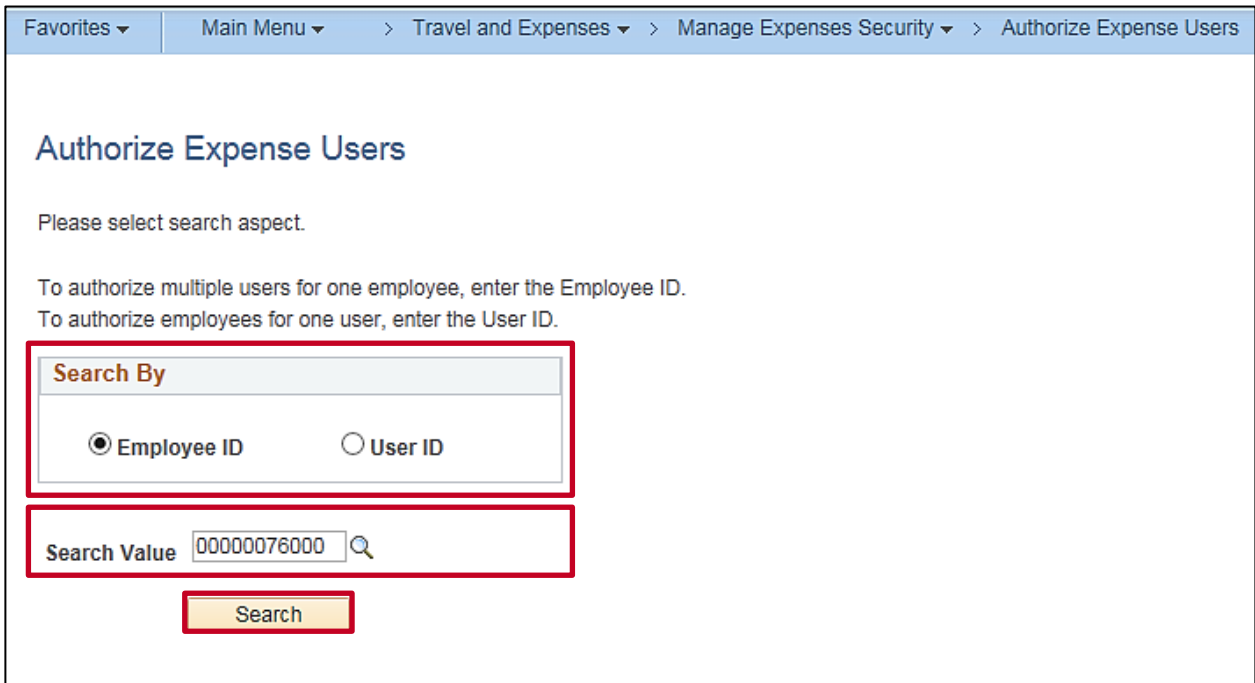
Employee ID User ID

Search Value 🔍

Search

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).
3. Click the **Search** button.












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

Authorize Expense Users - Employee

Search Type Employee ID

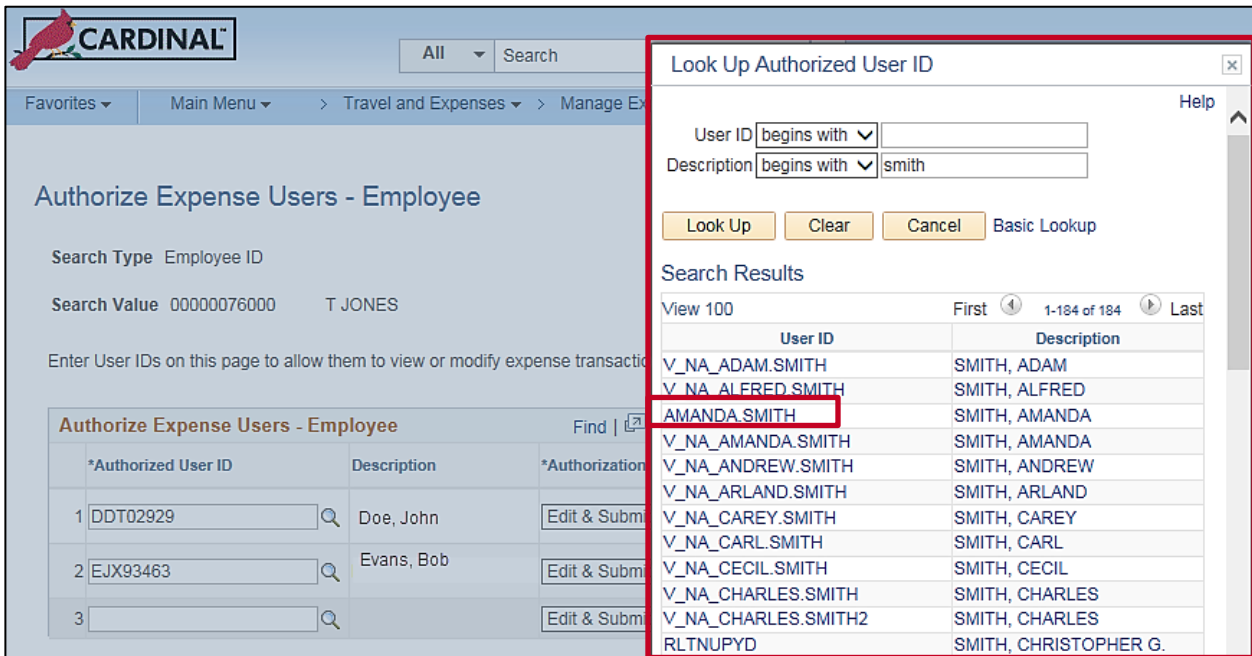
Search Value 00000076000 T JONES

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 DDT02929 	Doe, John	Edit & Submit				
2 EJX93463 	Evans, Bob	Edit & Submit				
3 		Edit & Submit				

[Return to Search](#)

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



The screenshot shows the 'Authorize Expense Users - Employee' page in the Cardinal system. A 'Look Up Authorized User ID' pop-up window is open, displaying search criteria and a list of search results. The search criteria are: User ID begins with [] and Description begins with smith. The search results table is as follows:

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.

7. The **Look Up Authorized User ID** pop-up box displays.
8. 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.
9. Click the name of the employee you want to add as a proxy.
10. 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.
11. Enter the full name, or use the **contains** lookup to enter a partial name. Click the **Look Up** button and search results display.
12. Search the listing and click the appropriate link under the **Description** column within the **Search Results** to select the proxy.
13. Verify that this is the intended proxy.
14. Click either the **User ID** or the name of the employee you want to add as a proxy.

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 [?] [grid]	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				+ -

Save

[Return to Search](#)

15. 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.
16. To authorize additional proxies, click the (+) button and repeat the steps to search for, add, and select the **Authorization Level** for each proxy.
17. Click the **Save** button.
18. 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 🔍

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.

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

Authorize Expense Users - User

Search Type User ID

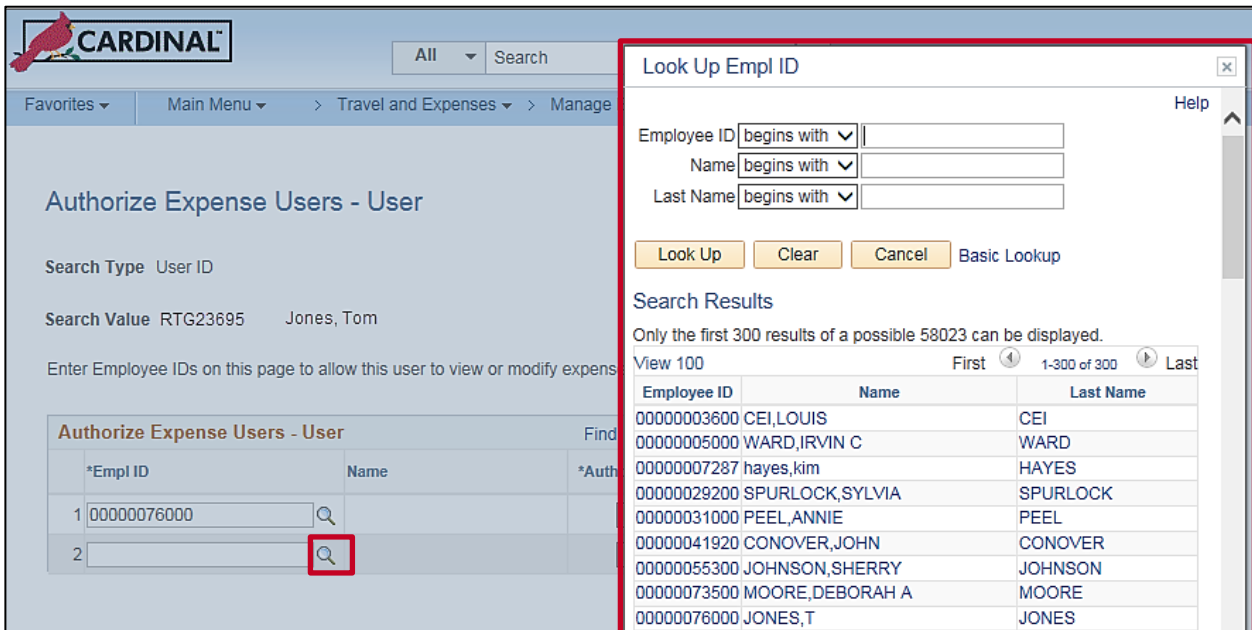
Search Value RTG23695 Jones, Tom

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

Authorize Expense Users - User			Find  	First  1 of 1  Last
*Empl ID	Name	*Authorization Level		
1 <input type="text" value="00000076000"/>		<input type="text" value="Edit & Submit"/>		 

[Return to Search](#)

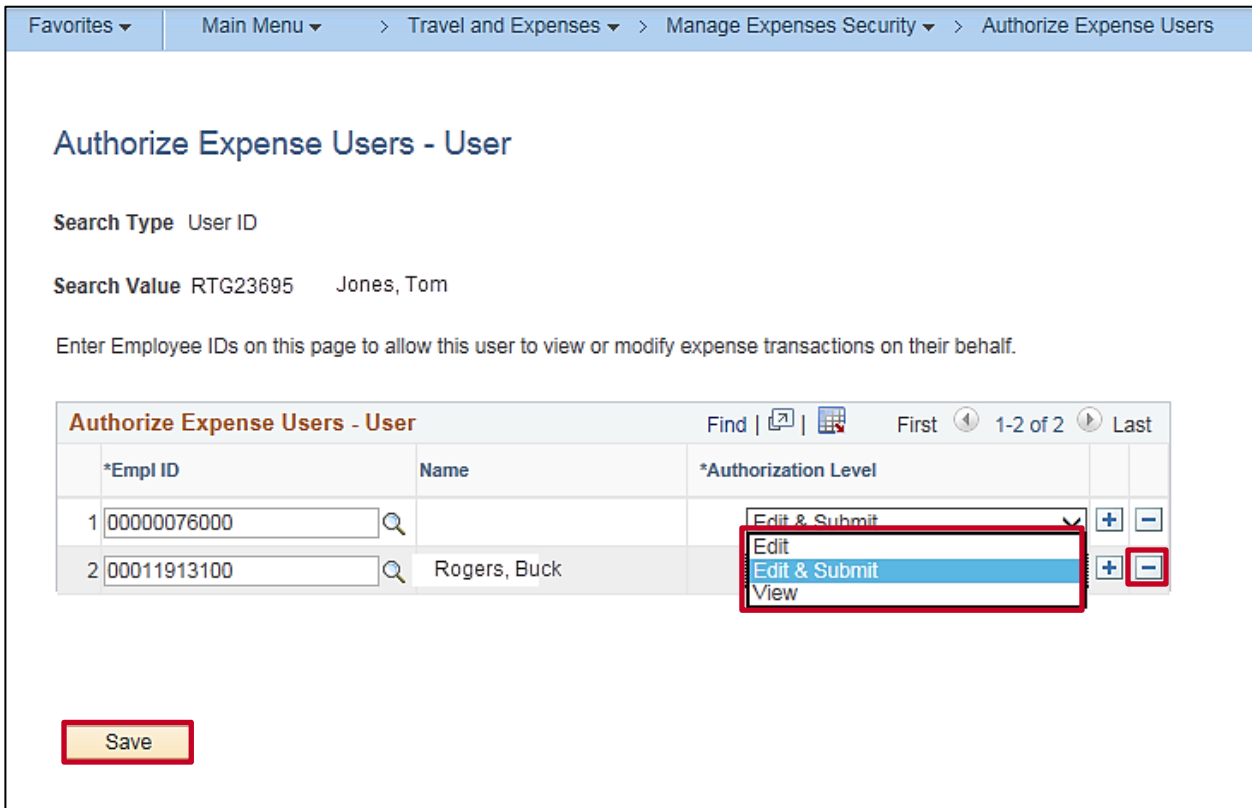
2. The **Authorize Expense Users – User** page displays. This page allows you to enter employees that the selected user can be proxy for.
3. To add an employee, click the (+) button.



The screenshot shows the 'Authorize Expense Users - User' screen in the Cardinal software. A 'Look Up Empl ID' dialog box is open, allowing the user to search for an employee. The dialog box has three search criteria: Employee ID (beginning with), Name (beginning with), and Last Name (beginning with). Below the search criteria are buttons for 'Look Up', 'Clear', and 'Cancel', along with a 'Basic Lookup' link. The 'Search Results' section shows a table of results with columns for Employee ID, Name, and Last Name. The table lists 10 employees, including CEI, LOUIS; WARD, IRVIN C; HAYES, KIM; SPURLOCK, SYLVIA; PEEL, ANNIE; CONOVER, JOHN; JOHNSON, SHERRY; MOORE, DEBORAH A; and JONES, T.

Employee ID	Name	Last Name
0000003600	CEI, LOUIS	CEI
0000005000	WARD, IRVIN C	WARD
0000007287	hayes, kim	HAYES
00000029200	SPURLOCK, SYLVIA	SPURLOCK
00000031000	PEEL, ANNIE	PEEL
00000041920	CONOVER, JOHN	CONOVER
00000055300	JOHNSON, SHERRY	JOHNSON
00000073500	MOORE, DEBORAH A	MOORE
00000076000	JONES, T	JONES

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.



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
2 00011913100	Rogers, Buck	Edit & Submit

Save

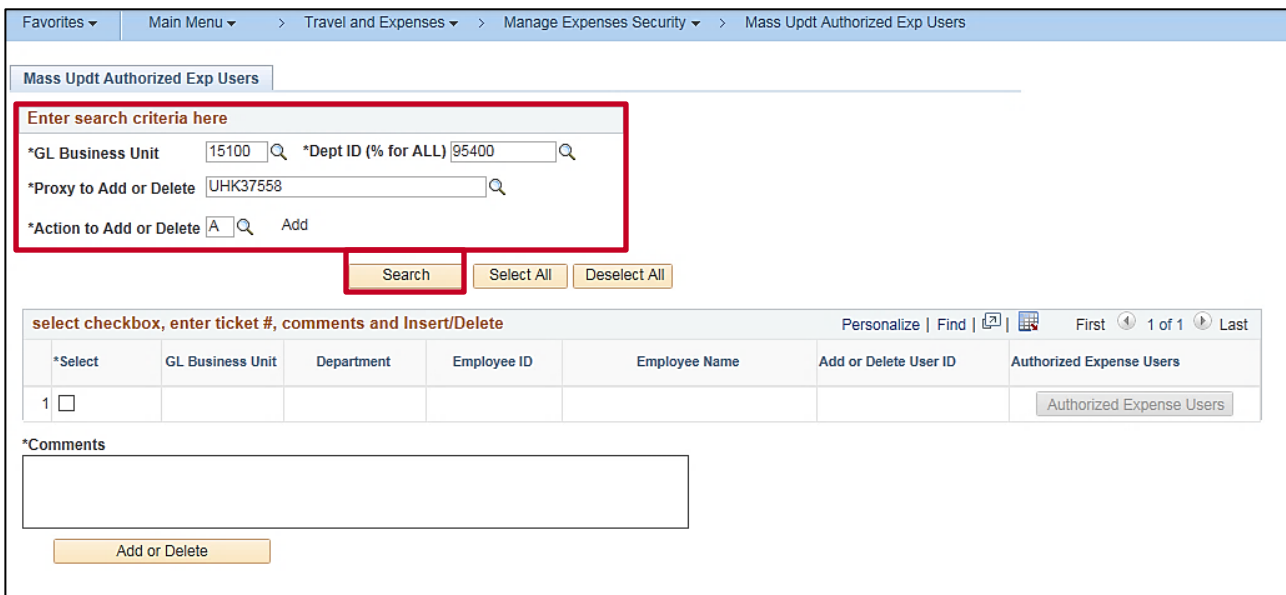
7. Once you add the employee under the proxy, assign the **Authorization Level** the proxy needs for that employee. The proxy will still require the proper security roles. There are three options to choose from:
 - a. **Edit**: Allows the proxy to view, create, and edit a transaction for the employee. 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.

Mass Update of Authorized Expense Users

The **Mass Updt Authorized Exp Users** page is used to add or delete an authorized user/proxy for a large number of 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.

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



Mass Updt Authorized Exp Users

Enter search criteria here

*GL Business Unit *Dept ID (% for ALL)

*Proxy to Add or Delete

*Action to Add or Delete Add

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 <input type="checkbox"/>						Authorized Expense Users

*Comments

Add or Delete

2. To add or delete a proxy for large number of employees, enter or select the following under the **Enter search criteria** section of the page:
 - a. In the **GL Business Unit** field, enter or select the Business Unit.
 - b. In the **Dept ID** field, you can enter a specific department or enter % for all departments. For this example, a specific Department ID was selected.
 - c. In the **Proxy to Add or Delete** field, enter or select the User ID of the person you want to add or delete. For this example, we are adding a proxy for multiple employees.
 - d. In the **Action to Add or Delete** field:
 - i. Enter or select **A** to add the proxy.
 - ii. Enter or select **D** to delete to remove the proxy.

For this example, **A** is selected.

Note: The process steps to add and delete are the same. The only difference is in this step where you select if you are adding or deleting.

3. Click the **Search** button.

SW AP315: Authorizing a Proxy for an Employee

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Expenses Security ▾ > Mass Updt Authorized Exp Users

mass Updt Authorized Exp Users

Enter search criteria here

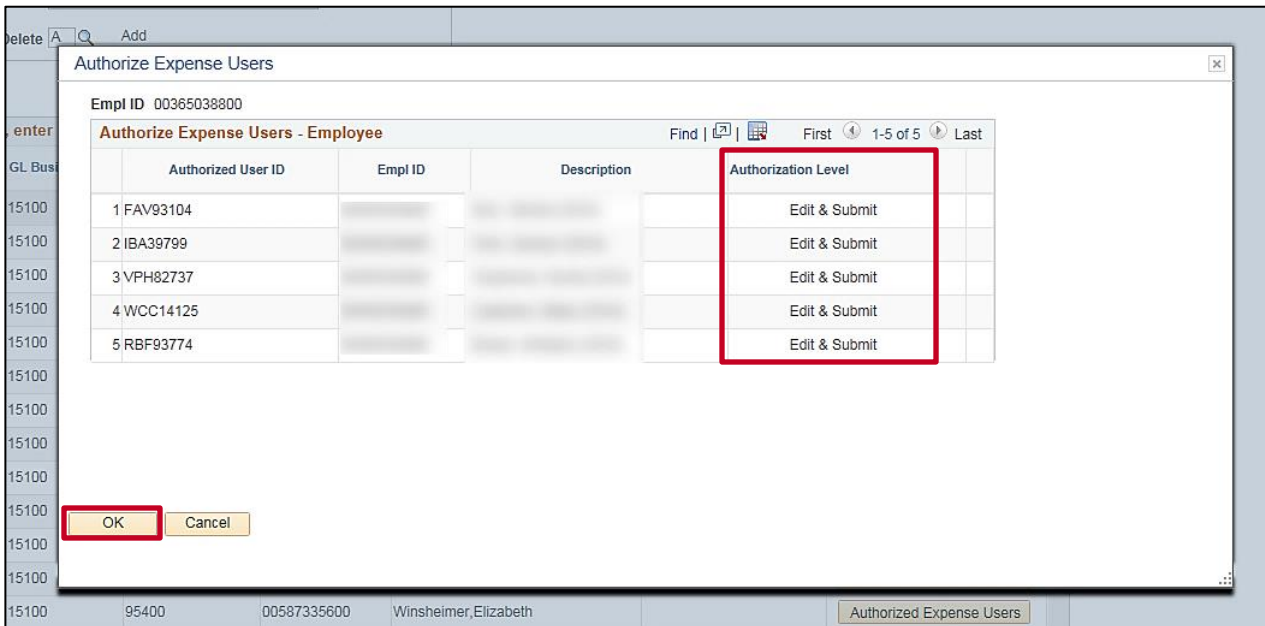
*GL Business Unit *Dept ID (% for ALL)
 *Proxy to Add or Delete
 *Action to Add or Delete Add

select checkbox Personalize | Find | First 1-24 of 24 Last

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users
<input type="checkbox"/>	15100	95400				Authorized Expense Users

*Comments

4. The **Search** results display at the bottom of the page.
5. To see a list of current authorized users for a specific employee, click the **Authorized Expense Users** button next to the employee you want to view.



6. The **Authorize Expense Users** pop-up window displays. This allows you to view all current authorized users and what they are authorized to do for that user, which is listed under the **Authorization Level** column.
7. Click the **OK** button to return.

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 *Dept ID (% for ALL)
 *Proxy to Add or Delete
 *Action to Add or Delete Add

select checkbox Personalize | Find | First 1-24 of 24 Last

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users

*Comments

- Select the employees that you need to add the proxy. You can use the **Select All** button to select everyone that displays.

Note: You must use the scroll bar to scroll down the page to view all the employees that display on the list.

SW AP315: Authorizing a Proxy for an Employee

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 *Dept ID (% for ALL)
 *Proxy to Add or Delete
 *Action to Add or Delete Add

select checkbox Personalize | Find | | First 1-24 of 24 Last

*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400				Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users
<input checked="" type="checkbox"/>	15100	95400			UHK37558	Authorized Expense Users

*Comments
Employee will handle travel entry for this entire department per John Doe.

9. For this scenario, the selected proxy is already set up for seven employees based on the search. You do not need to uncheck the **Select** box as no updates will occur. Cardinal only updates if the proxy differs from what the employee already has set up in the system.
10. After selecting the appropriate employees, enter notes as to the reason for the addition or deletion of a proxy in the **Comments** box.
11. Click the **Add or Delete** button.

SW AP315: Authorizing a Proxy for an Employee

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 *Dept ID (% for ALL)

*Proxy to Add or Delete

*Action to Add or Delete Add

select checkbox							Personalize Find [?] []	First 1-24 of 24 Last
*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		
<input type="checkbox"/>	15100	95400			UHK37558	<input type="button" value="Authorized Expense Users"/>		

*Comments

Employee will handle travel entry for this entire department per John Doe.

12. In this example, we added the proxy. The **Add or Delete User ID** field populates with the proxy ID. The proxy has been added to any account selected where he/she has not been set up as a proxy previously.