



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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AP315 Authorizing a Proxy for an Employee

Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal System upgrades.
10/23/2024	Baseline.



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Authorizing a Proxy

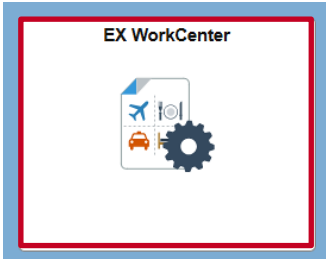
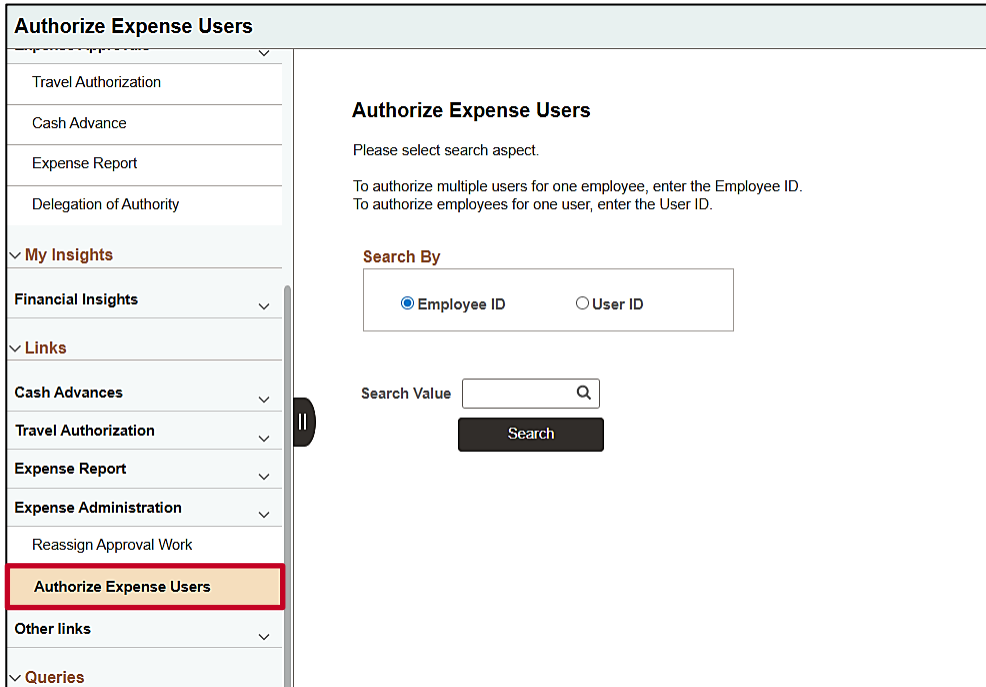
There are two ways to authorize a Proxy for an employee:

- [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.	Navigate to the Authorize Expense Users page by clicking the EX WorkCenter tile on the Cardinal Financials Homepage. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Expense Administration > Authorize Expense Users Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Authorize Expense Users page using the following navigation path:

Step	Action
	NavBar > Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users
	The Authorize Expense Users page displays. 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
	The Search By section defaults with the Employee ID radio button selected. Do not change it.
3.	Enter or select the Employee ID in the Search Value field. Search Value
4.	Click the Search button. Search



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Step	Action																																
	The Authorize Expense Users – Employee page displays. 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 1-5 of 5 ▼ > > <table><tr><th></th><th>*Authorized User ID</th><th>Description</th><th>*Authorization Level</th><th></th><th></th></tr><tr><td>1</td><td> </td><td rowspan="5"></td><td> Edit & Submit ▼ </td><td> + </td><td> - </td></tr><tr><td>2</td><td> </td><td> Edit & Submit ▼ </td><td> + </td><td> - </td></tr><tr><td>3</td><td> </td><td> Edit & Submit ▼ </td><td> + </td><td> - </td></tr><tr><td>4</td><td> </td><td> Edit & Submit ▼ </td><td> + </td><td> - </td></tr><tr><td>5</td><td> </td><td> Edit & Submit ▼ </td><td> + </td><td> - </td></tr></table> Save Return to Search		*Authorized User ID	Description	*Authorization Level			1			Edit & Submit ▼	+	-	2		Edit & Submit ▼	+	-	3		Edit & Submit ▼	+	-	4		Edit & Submit ▼	+	-	5		Edit & Submit ▼	+	-
	*Authorized User ID	Description	*Authorization Level																														
1			Edit & Submit ▼	+	-																												
2			Edit & Submit ▼	+	-																												
3			Edit & Submit ▼	+	-																												
4			Edit & Submit ▼	+	-																												
5			Edit & Submit ▼	+	-																												
i	If the employee is already a Proxy for an employee or multiple employees, they will display on this page.																																
5.	Click the Add a New Row (+) button to add a new blank row. + -																																
i	To delete an existing Proxy, click the Delete Row (-) button next to the name that needs to be deleted.																																



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Step

Action

The new row displays.

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

1-6 of 6

	*Authorized User ID	Description	*Authorization Level		
1			Edit & Submit	+	-
2			Edit & Submit	+	-
3			Edit & Submit	+	-
4			Edit & Submit	+	-
5			Edit & Submit	+	-
6			Edit & Submit	+	-

Save

Return to Search

6.

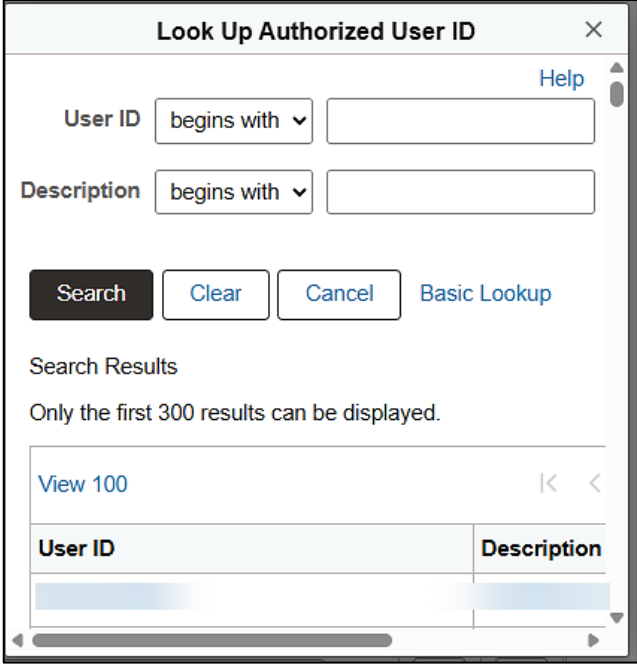
Click the **Authorized User ID Look up** icon.

6



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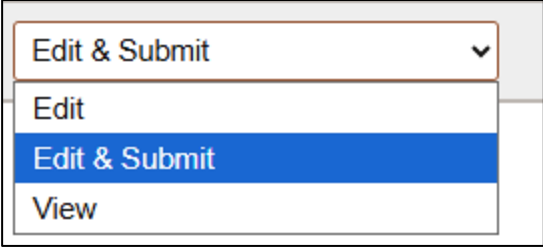
Step	Action				
	The Look Up Authorized User ID page displays in a pop-up window. 				
	Use the User ID or Description options to search for the specific employee. • User ID: This option allows the user to search using the employee's Cardinal User ID • Description: This option allows the user to search using the last name of the employee				
7.	Select the employee from the list. <table border="1" data-bbox="258 1276 930 1398"><thead><tr><th>User ID</th><th>Description</th></tr></thead><tbody><tr><td></td><td></td></tr></tbody></table>	User ID	Description		
User ID	Description				



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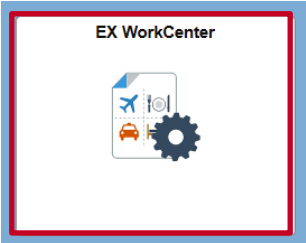
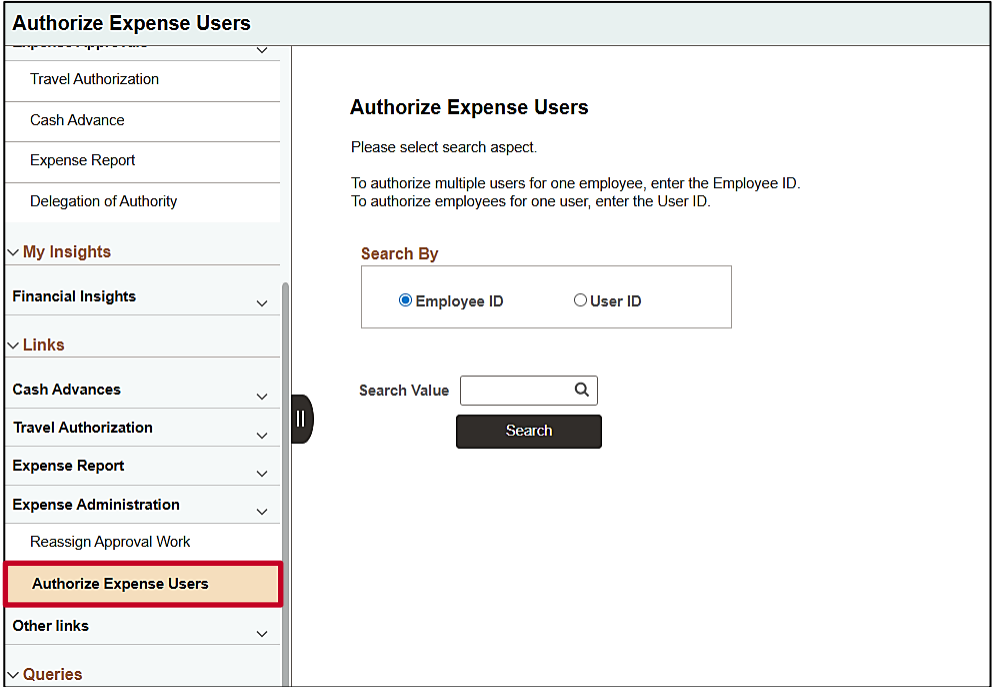
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Step	Action																																					
	The selected employee displays in the new row. Authorize Expense Users - Employee Search Type Employee ID Search Value Enter User IDs on this page to allow them to view or modify expense transaction on behalf of this employee. Authorize Expense Users - Employee 1-6 of 6 <table><tr><th></th><th>*Authorized User ID</th><th>Description</th><th>*Authorization Level</th><th></th><th></th></tr><tr><td>1</td><td> </td><td rowspan="6"></td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>2</td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>3</td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>4</td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>5</td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>6</td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr></table> Save Return to Search		*Authorized User ID	Description	*Authorization Level			1			Edit & Submit	+	-	2		Edit & Submit	+	-	3		Edit & Submit	+	-	4		Edit & Submit	+	-	5		Edit & Submit	+	-	6		Edit & Submit	+	-
	*Authorized User ID	Description	*Authorization Level																																			
1			Edit & Submit	+	-																																	
2			Edit & Submit	+	-																																	
3			Edit & Submit	+	-																																	
4			Edit & Submit	+	-																																	
5			Edit & Submit	+	-																																	
6			Edit & Submit	+	-																																	
	The Authorization Level field defaults to “Edit & Submit”.																																					
8.	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. Edit & Submit																																					

Step	Action
	There are three options:  • 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.
9.	Verify that the appropriate value has been selected. For this scenario, the default value of “Edit & Submit” is applicable. 
10.	To authorize additional Proxies, repeat Steps 5 - 9 .
11.	After all Proxies have been added, click the Save button. 
	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 to authorize an employee to be an authorized user/Proxy for multiple employees.

Step	Action
1.	Navigate to the Authorize Expense Users page by clicking the EX WorkCenter tile on the Cardinal Financials Homepage. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Expense Administration > Authorize Expense Users Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Authorize Expense Users page using the following navigation path: NavBar > Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users

Step	Action
	The Authorize Expense Users page displays. 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
	The Search By section defaults with the Employee ID radio button selected.
3.	Select the User ID radio button. ☐ User ID
4.	Click the Search button. Search
5.	Enter or select the User ID in the Search Value field. Search Value



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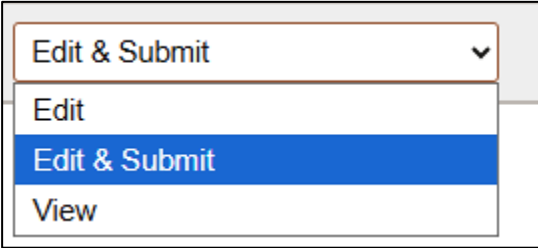
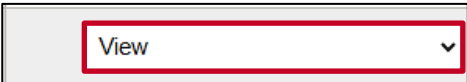
Step	Action												
	The Authorize Expense Users – User page displays. Authorize Expense Users - User Search Type User ID Search Value Enter Employee IDs on this page to allow this user to view or modify expense transactions on their behalf. Authorize Expense Users - User << < 1-1 of 1 > >> <table><tr><th></th><th>*Empl ID</th><th>Name</th><th>*Authorization Level</th><th></th><th></th></tr><tr><td>1</td><td> </td><td> </td><td> Edit & Submit </td><td> + </td><td> - </td></tr></table> Save Return to Search		*Empl ID	Name	*Authorization Level			1			Edit & Submit	+	-
	*Empl ID	Name	*Authorization Level										
1			Edit & Submit	+	-								
6.	Click the Add a New Row (+) button to add a new row. Note: If the employee is not currently a Proxy for an employee, go to Step 7.												



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Step	Action																		
	A new row displays. Authorize Expense Users - User Search Type User ID Search Value Enter Employee IDs on this page to allow this user to view or modify expense transactions on their behalf. Authorize Expense Users - User < 1-2 of 2 > <table border="1"><thead><tr><th></th><th>*Empl ID</th><th>Name</th><th>*Authorization Level</th><th></th><th></th></tr></thead><tbody><tr><td>1</td><td> </td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr><tr><td>2</td><td> </td><td> </td><td>Edit & Submit</td><td>+</td><td>-</td></tr></tbody></table> Save Return to Search		*Empl ID	Name	*Authorization Level			1			Edit & Submit	+	-	2			Edit & Submit	+	-
	*Empl ID	Name	*Authorization Level																
1			Edit & Submit	+	-														
2			Edit & Submit	+	-														
	To delete an existing Proxy, click the Delete Row (-) button next to the name that needs to be deleted.																		
7.	Enter the applicable Employee ID in the Empl ID field. 2																		
	Once the Employee ID is entered or selected, the Name field populates.																		
8.	Verify that this is the appropriate employee. Name																		

Step	Action
9.	Select the Proxy's authorization level for the employee in the Authorization Level field by clicking the dropdown menu. 
	There are three options:  • 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.
10.	Verify that the appropriate value has been selected. For this scenario, the "View" option is selected. 
11.	To authorize additional expense users for the Proxy, click the Add a New Row (+) button and repeat the Steps 6 - 10 to search for and add the expense user, and then select the Proxy's Authorization Level for each expense user.
12.	After all Proxies have been added, click the Save button. 
	The added Proxy can now handle transactions for the employee(s) assigned based on the Authorization Level that was selected.

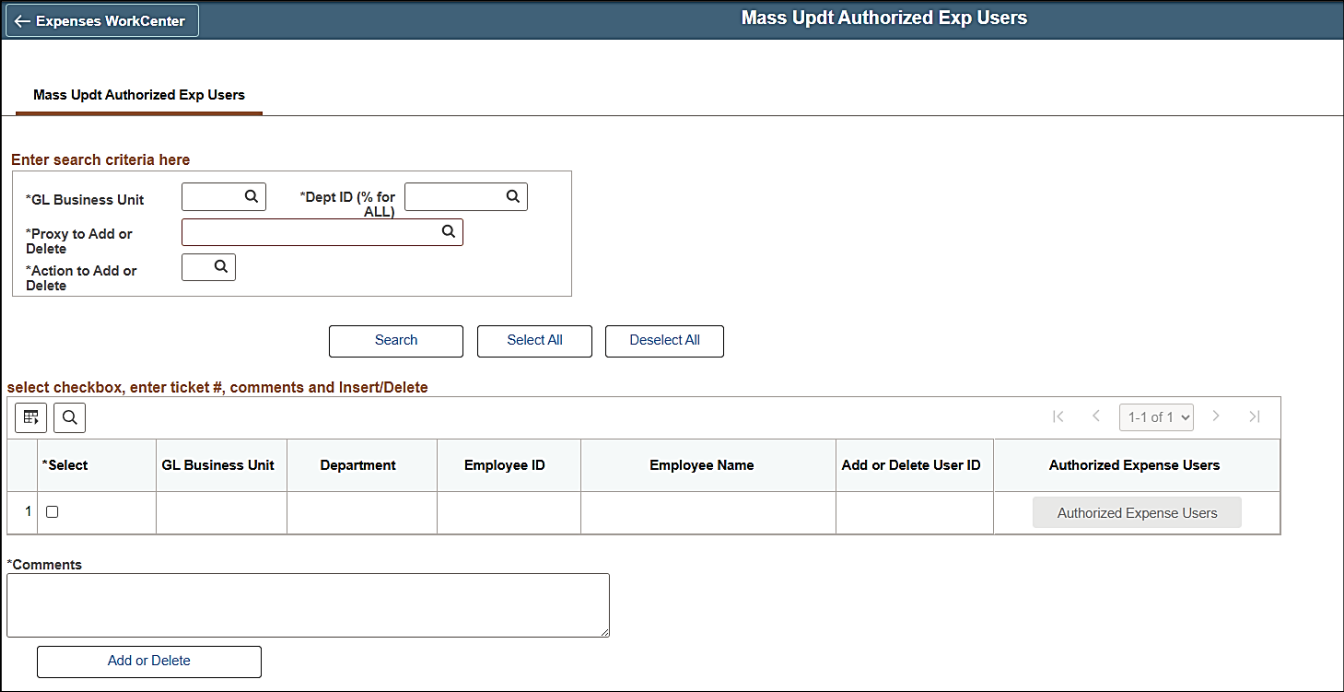
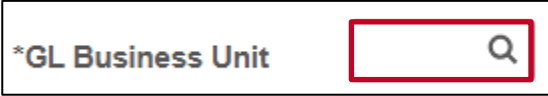


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Completing a Mass Update of Authorized Expense Users

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: NavBar > Menu > Travel and Expenses > Manage Expenses Security > Mass Updt Authorized users The Mass Updt Authorized Exp Users page displays. 
2.	Enter the Business Unit in the GL Business Unit field. 
3.	Enter or select a specific Department in the Dept ID (% for ALL) field. 
	To select all Departments, enter the wildcard (%) symbol in this field. For this scenario, a specific Department is entered.



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Step	Action
4.	In the Proxy to Add or Delete field, enter or select the User ID of the person being added or deleted. *Proxy to Add or Delete
	In this example, a Proxy is being added 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. For this scenario, “A” is selected. *Action to Add or Delete A Add
6.	Click the Search button. Search Select All Deselect All

The search results display at the bottom of the page.

Mass Updt Authorized Exp Users

Enter search criteria here

*GL Business Unit

15100

*Dept ID (% for ALL)

95200

*Proxy to Add or Delete

*Action to Add or Delete

Add

Search

Select All

Deselect All

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

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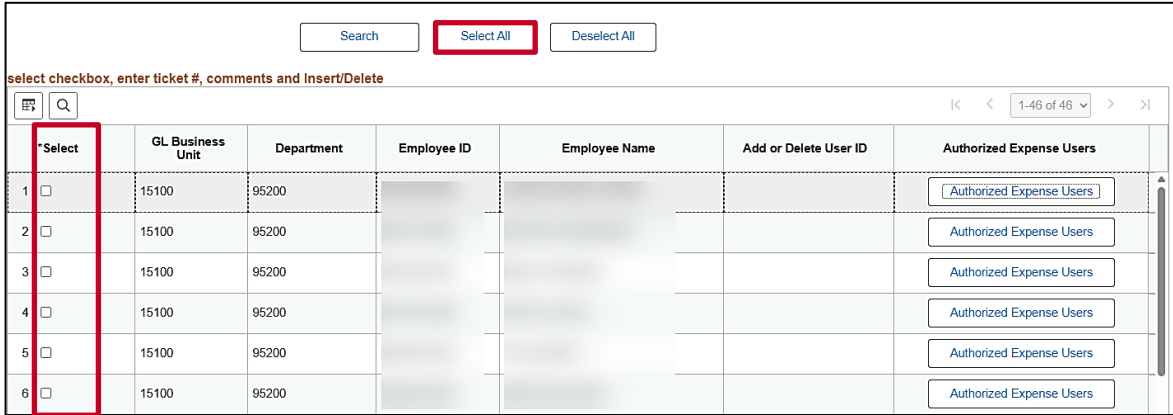
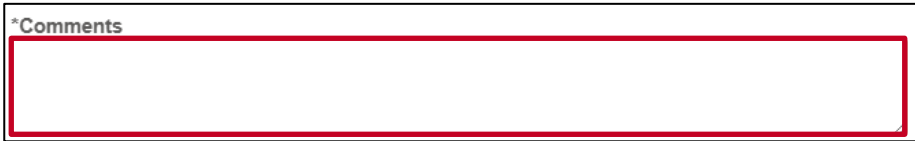
>

	*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
1	☐	15100	95200				Authorized Expense Users
2	☐	15100	95200				Authorized Expense Users
3	☐	15100	95200				Authorized Expense Users
4	☐	15100	95200				Authorized Expense Users
5	☐	15100	95200				Authorized Expense Users

*Comments

Add or Delete

Step	Action																																																															
7.	Click the Authorized Expense Users button next to a specific employee to see a list of current authorized users. Authorized Expense Users																																																															
The Authorize Expense Users page displays in a pop-up window. Authorize Expense Users Empl ID Authorize Expense Users - Employee < 1-8 of 8 > <table><thead><tr><th></th><th>Authorized User ID</th><th>Empl ID</th><th>Description</th><th>Authorization Level</th><th></th><th></th></tr></thead><tbody><tr><td>1</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>2</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>3</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>4</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>5</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>6</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>7</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr><tr><td>8</td><td></td><td></td><td></td><td>Edit & Submit</td><td></td><td></td></tr></tbody></table> OK Cancel			Authorized User ID	Empl ID	Description	Authorization Level			1				Edit & Submit			2				Edit & Submit			3				Edit & Submit			4				Edit & Submit			5				Edit & Submit			6				Edit & Submit			7				Edit & Submit			8				Edit & Submit		
	Authorized User ID	Empl ID	Description	Authorization Level																																																												
1				Edit & Submit																																																												
2				Edit & Submit																																																												
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4				Edit & Submit																																																												
5				Edit & Submit																																																												
6				Edit & Submit																																																												
7				Edit & Submit																																																												
8				Edit & Submit																																																												
i	This allows the user to view all current authorized users and what they are authorized to do for that user (listed under the Authorization Level column).																																																															
8.	Click the OK button to return. OK Cancel																																																															

Step	Action
9.	Select the corresponding Select checkbox option(s) by the employees for which the Proxy is being added. 
	The Select All button will select every employee displayed. The user must use the scroll bar to scroll down the page to view all the employees that display on the list. 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.
10.	Enter notes as to the reason for the addition or deletion of a Proxy in the Comments field. 
11.	Click the Add or Delete button. 



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Step

Action

The **Mass Updt Authorized Exp Users** page refreshes.

Mass Updt Authorized Exp Users

Enter search criteria here

*GL Business Unit

15100

Q

*Dept ID (% for ALL)

95200

Q

*Proxy to Add or Delete

Q

*Action to Add or Delete

A

Q

Add

Search

Select All

Deselect All

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

Q

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>|

	*Select	GL Business Unit	Department	Employee ID	Employee Name	Add or Delete User ID	Authorized Expense Users
1	☐	15100	95200			00801865000	Authorized Expense Users
2	☐	15100	95200			00801865000	Authorized Expense Users
3	☐	15100	95200			00801865000	Authorized Expense Users
4	☐	15100	95200			00801865000	Authorized Expense Users
5	☐	15100	95200			00801865000	Authorized Expense Users
6	☐	15100	95200			00801865000	Authorized Expense Users
7	☐	15100	95200			00801865000	Authorized Expense Users
8	☐	15100	95200			00801865000	Authorized Expense Users

*Comments

Employee will handle travel entry for the entire department per Fiscal Officer.

Add or Delete

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.