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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Revision History

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

Authorizing a Proxy

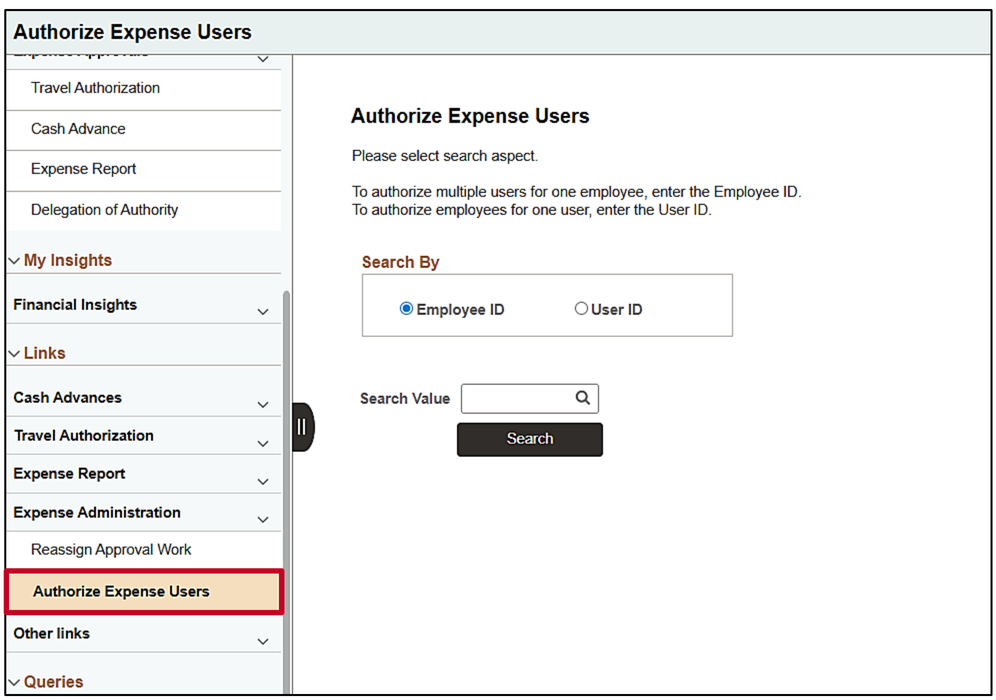
There are two ways to authorize a Proxy for an employee:

- 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.

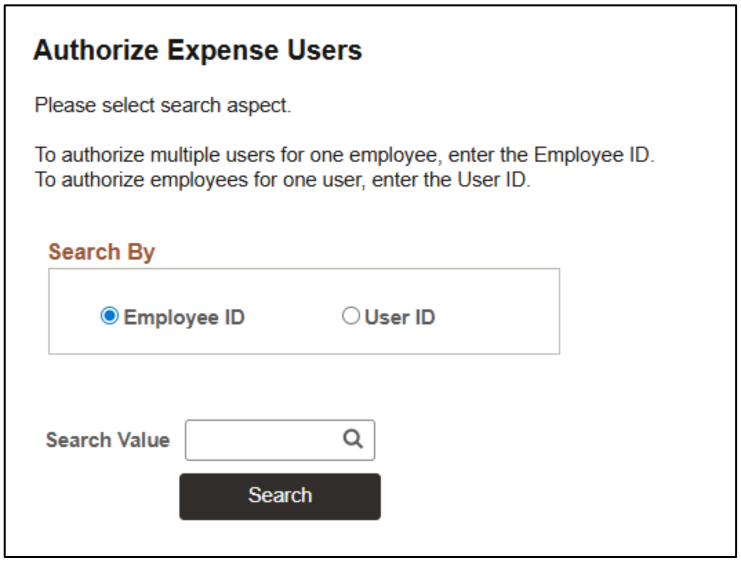
See the appropriate section of this Job Aid for the steps to enter information based on the options listed above.

Authorizing a Proxy Using the Employee ID

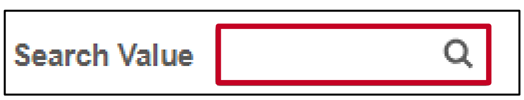
Use this option to authorize an employee to be a Proxy for one or more employees.

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:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>NavBar > Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users</td></tr>
<tr><td colspan="2">The Authorize Expense Users page displays.

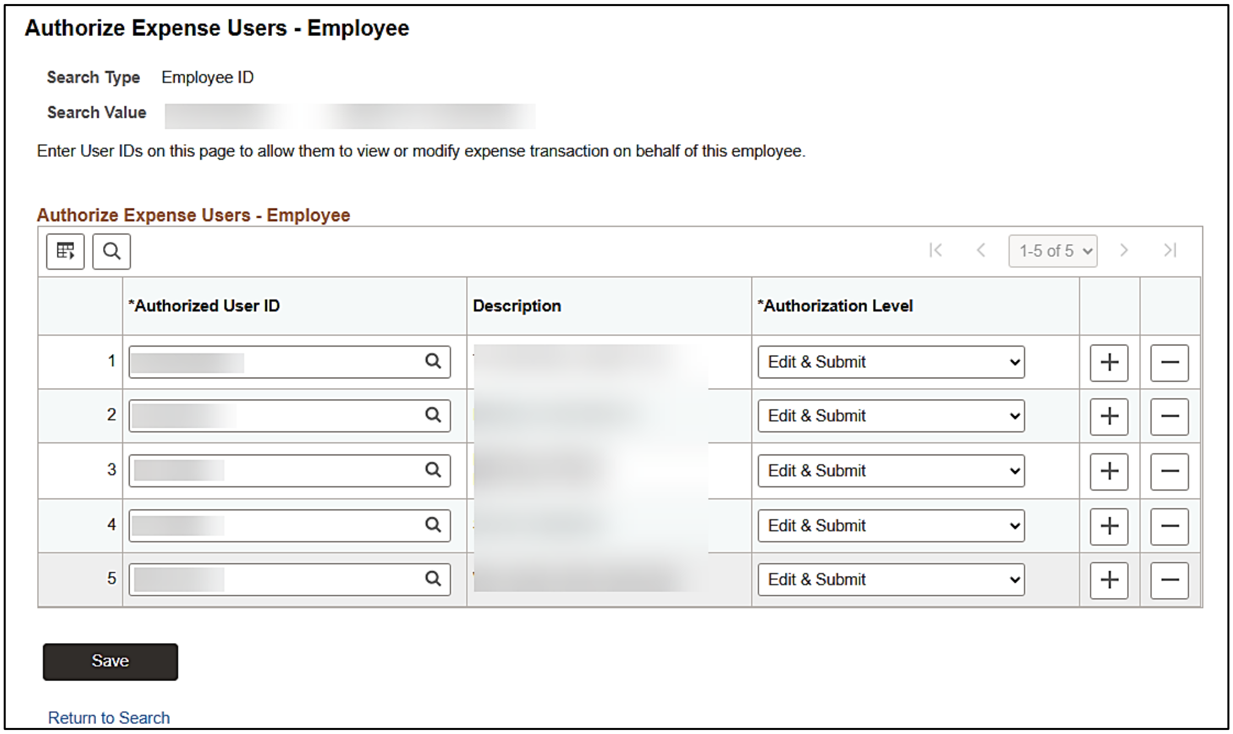
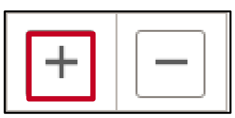


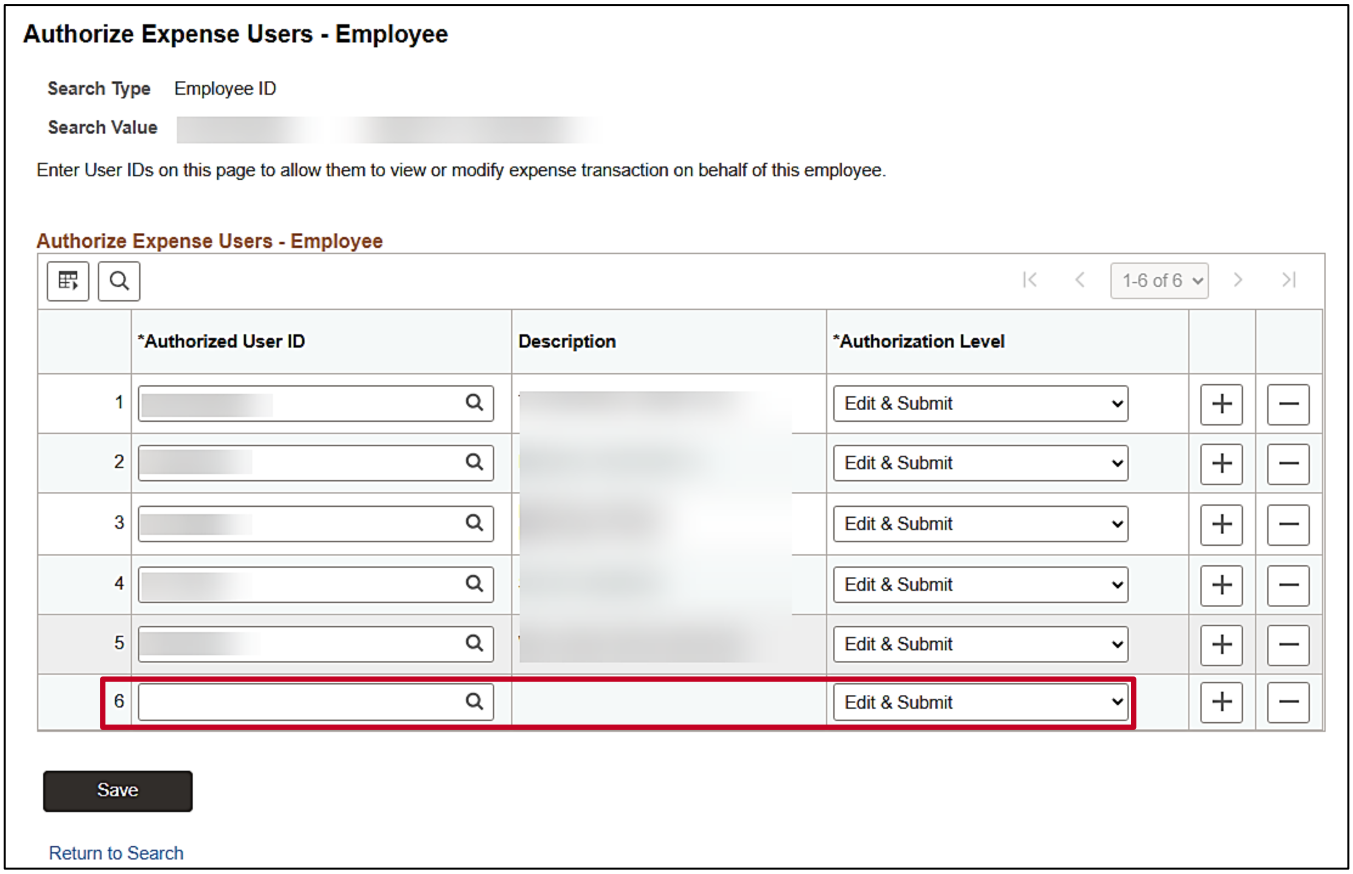
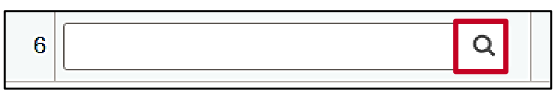
</td></tr>
<tr><td></td><td>The Search By section defaults with the Employee ID radio button selected. Do not change it.</td></tr>
<tr><td>3.</td><td>Enter or select the Employee ID in the Search Value field.

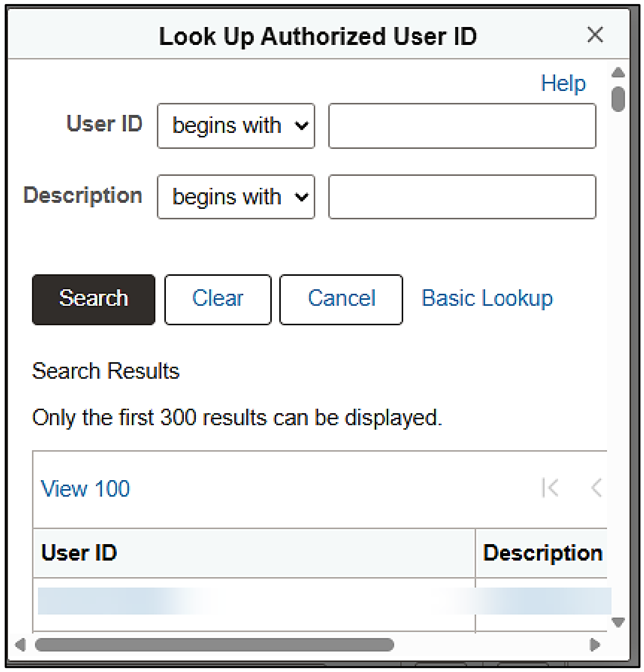
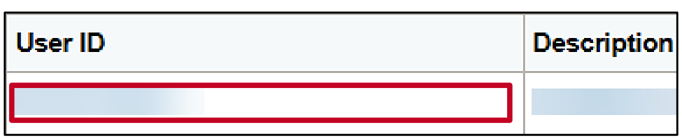


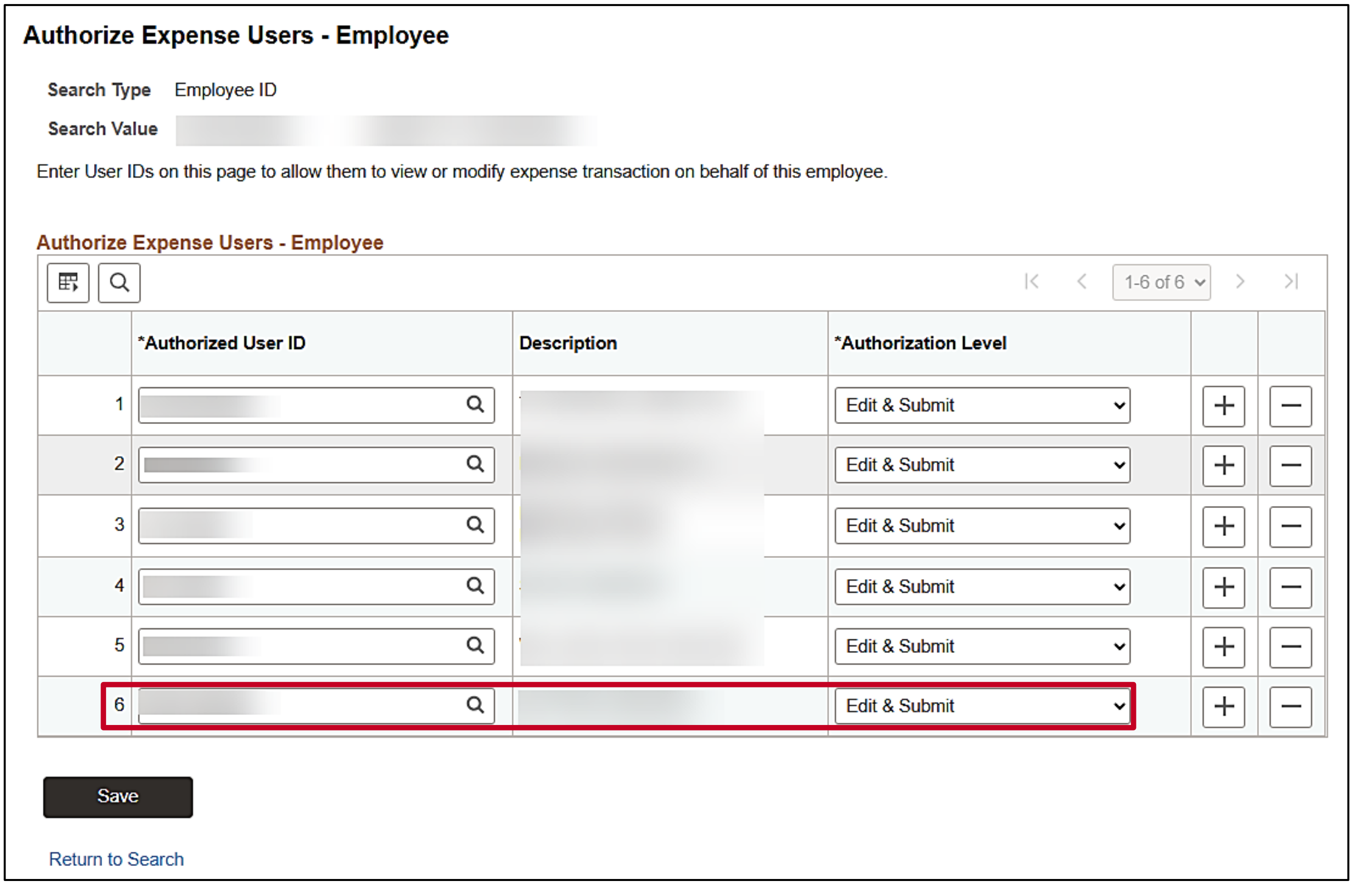
</td></tr>
<tr><td>4.</td><td>Click the Search button.

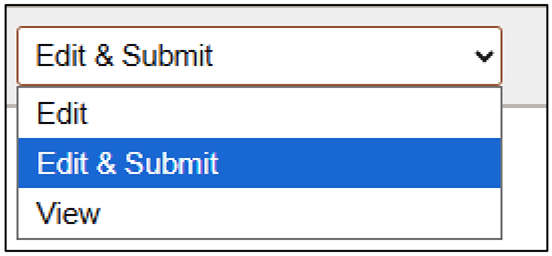
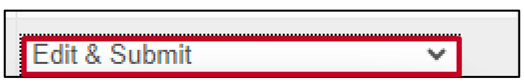
</td></tr>
</table>

Step	Action
The **Authorize Expense Users – Employee** page displays. 	
	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. 
	To delete an existing Proxy, click the **Delete Row** (**-**) button next to the name that needs to be deleted.

Step	Action
	The new row displays. 
6.	Click the **Authorized User ID Look up** icon. 

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. 

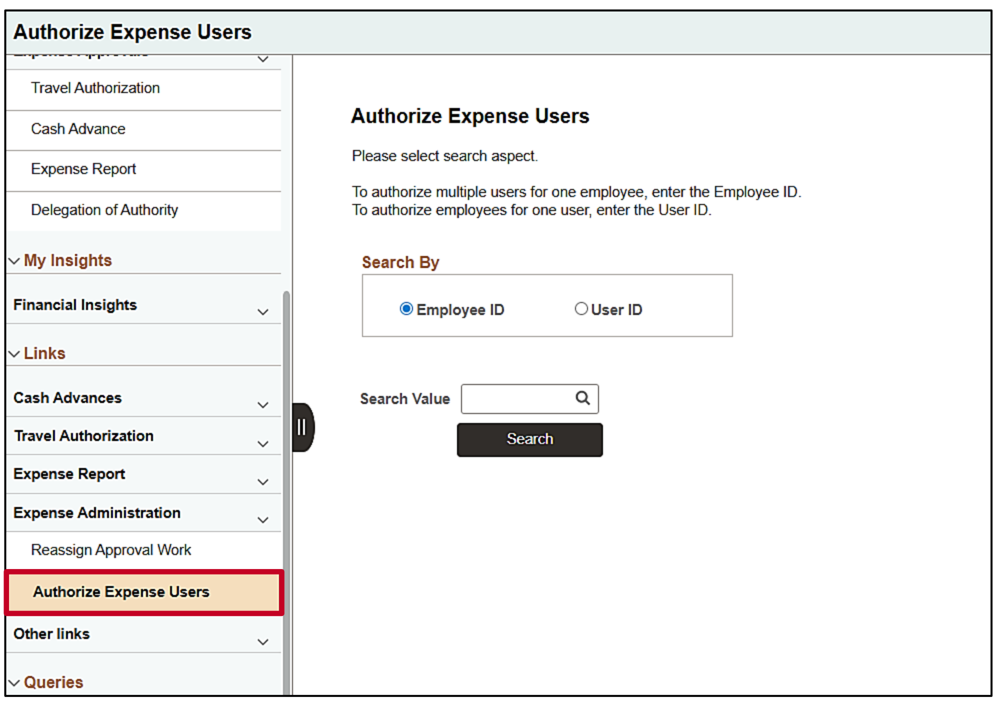
Step	Action
	The selected employee displays in the new row. 
	The **Authorization Level** field defaults to “Edit & Submit”.
8.	Select the Proxy’s authorization level for the employee in the **Authorization Level** field by clicking the dropdown menu and selecting the applicable authorization level. 

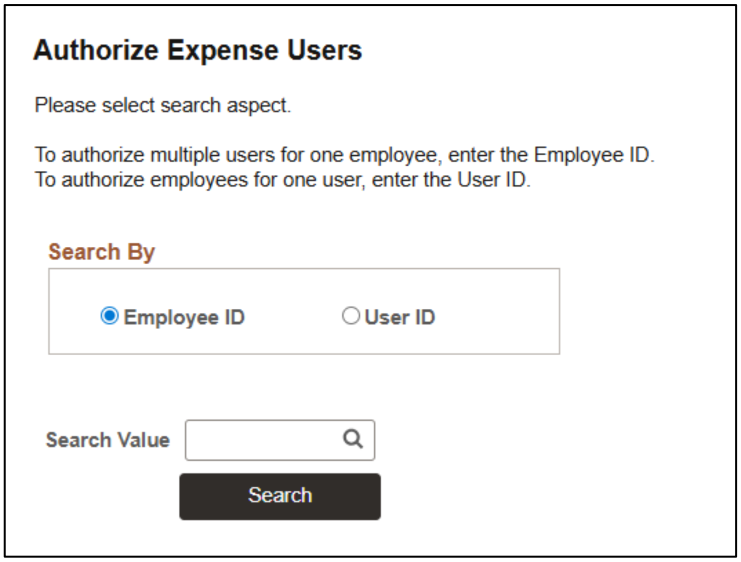
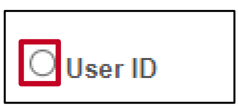
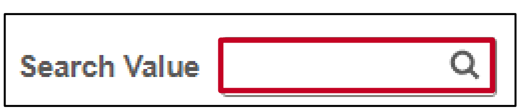
Step	Action
	There are three options:  • **Edit**: Allows the Proxy to view, create, and edit a transaction for the employee. When this option is selected, the **Submit** button is unavailable for expense related transactions. • **Edit & Submit**: Allows the Proxy to view, create, delete, cancel, edit, 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.

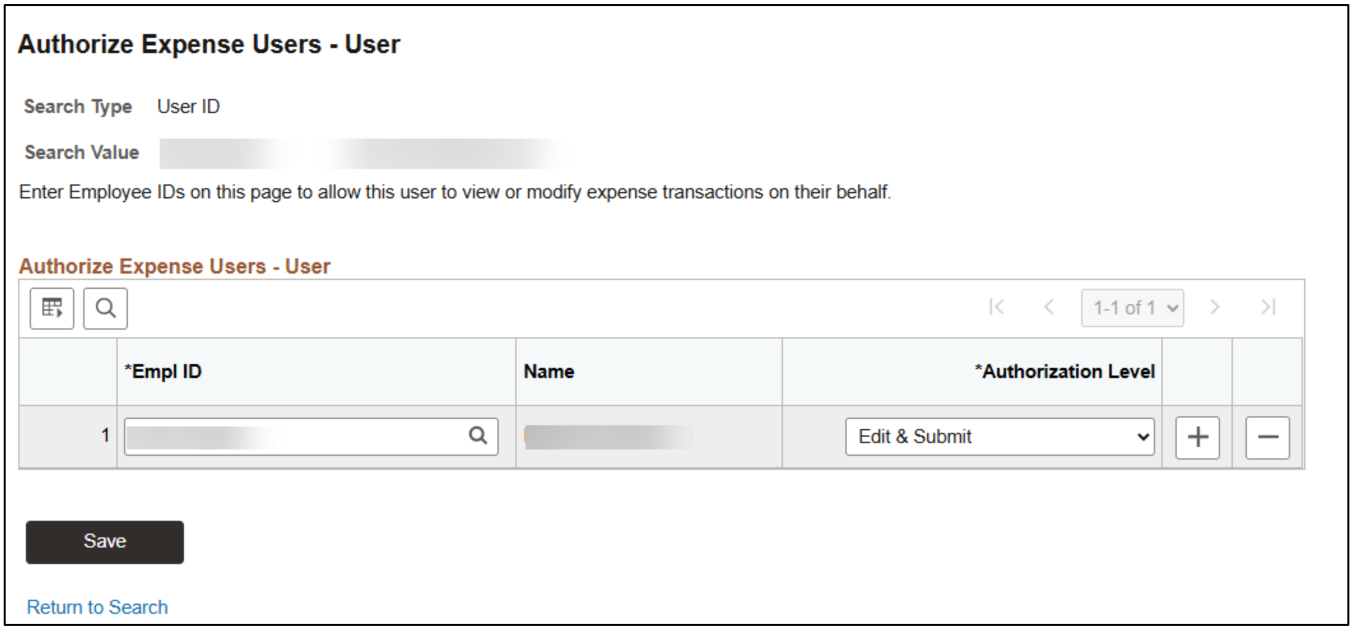
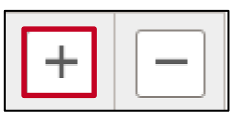
Authorizing a Proxy Using the User ID

Use this option to authorize an employee to be an authorized user/Proxy for multiple employees.

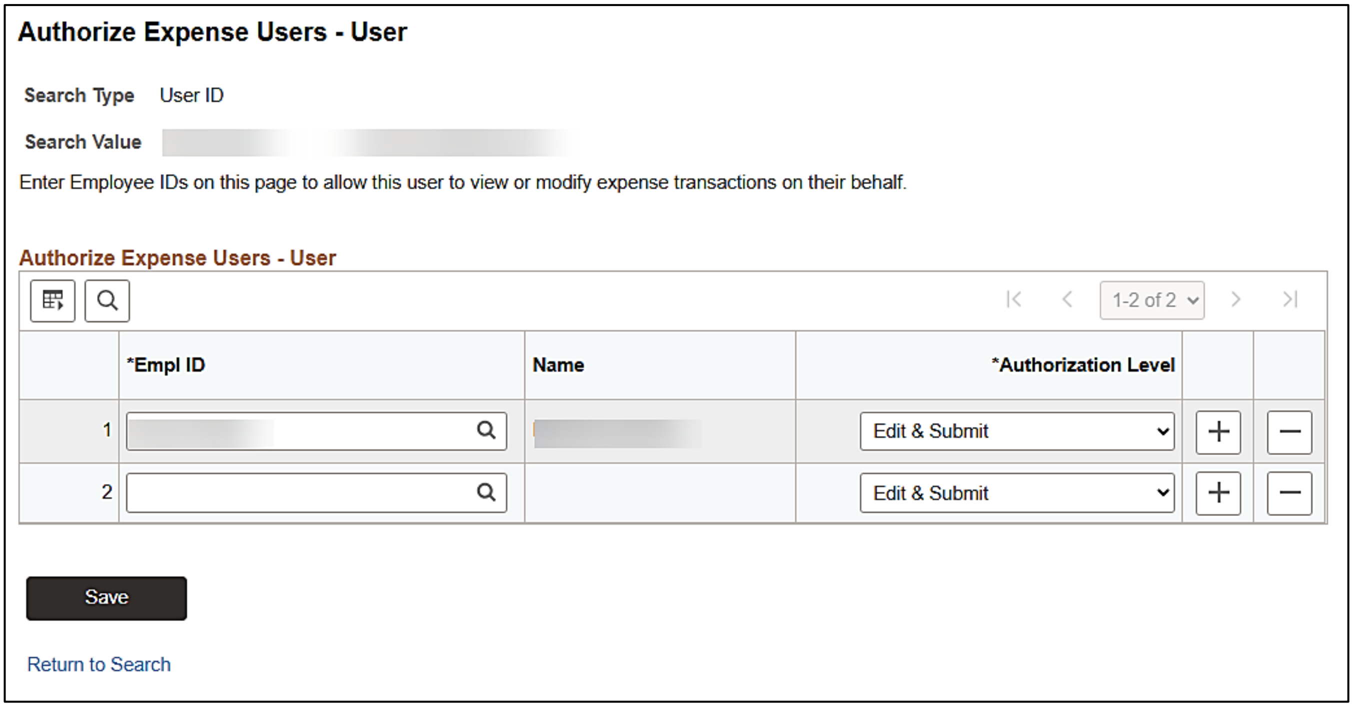
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Authorize Expense Users page by clicking the EX WorkCenter tile on the Cardinal Financials Homepage.

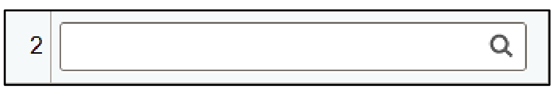
</td></tr>
<tr><td></td><td>For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation path in the WorkCenter: Links > Expense Administration > Authorize Expense Users
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

</td></tr>
<tr><td></td><td>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</td></tr>
</table>

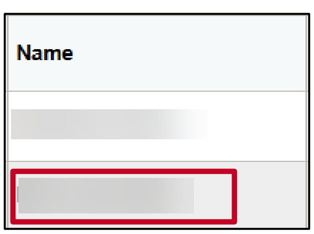
Step	Action
The **Authorize Expense Users** page displays. 	
	The **Search By** section defaults with the **Employee ID** radio button selected.
3.	Select the **User ID** radio button. 
4.	Click the **Search** button. 
5.	Enter or select the User ID in the **Search Value** field. 

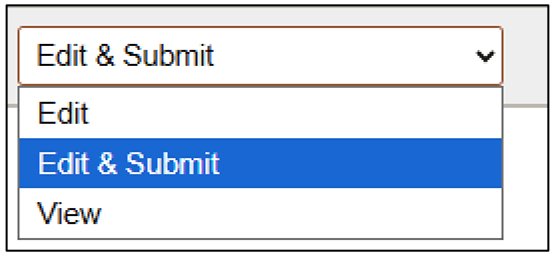
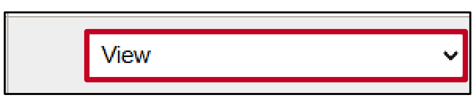
Step	Action
	The **Authorize Expense Users – User** page displays. 
6.	Click the **Add a New Row** (**+**) button to add a new row. **Note**: If the employee is not currently a Proxy for an employee, go to **Step 7**. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">A new row displays.


</td></tr>
<tr><td></td><td>To delete an existing Proxy, click the Delete Row (-) button next to the name that needs to be deleted.</td></tr>
<tr><td>7.</td><td>Enter the applicable Employee ID in the Empl ID field.

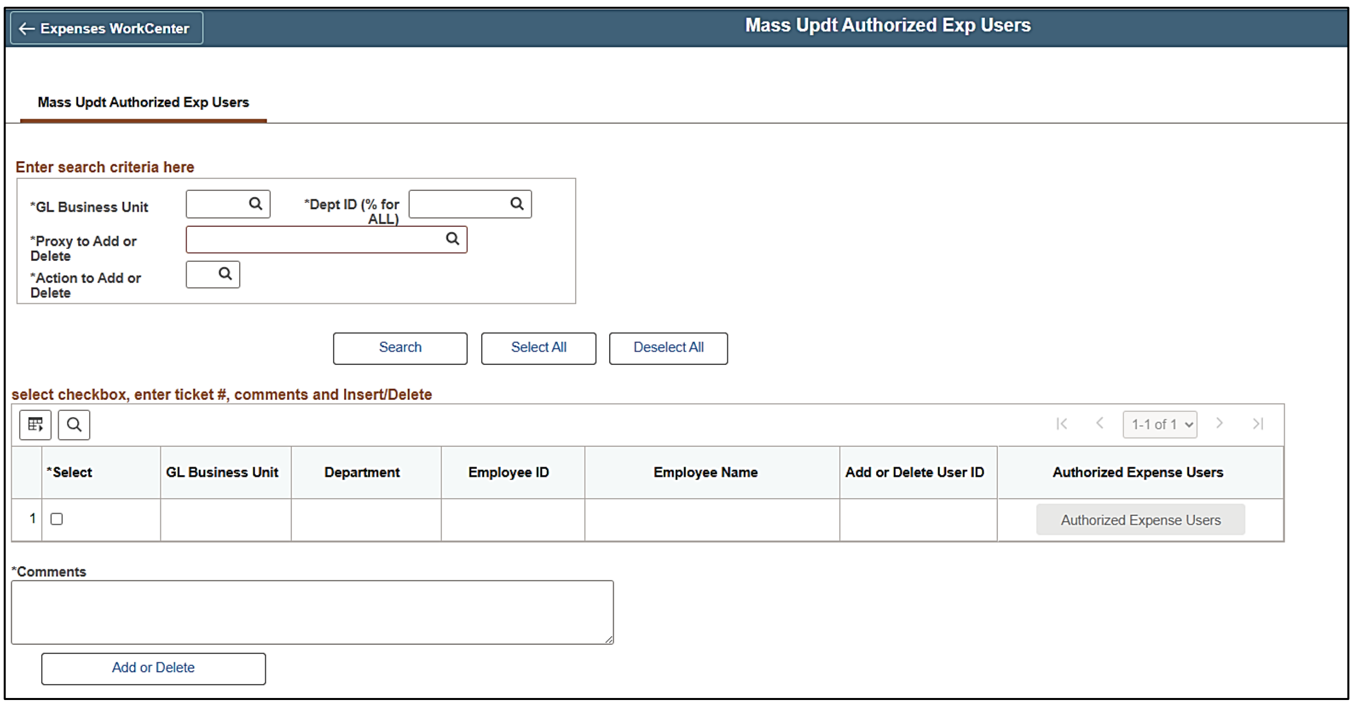
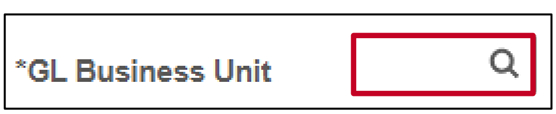
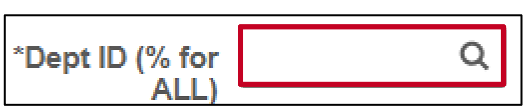

</td></tr>
<tr><td></td><td>Once the Employee ID is entered or selected, the Name field populates.</td></tr>
<tr><td>8.</td><td>Verify that this is the appropriate employee.

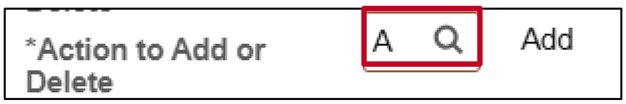

</td></tr>
</table>

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.

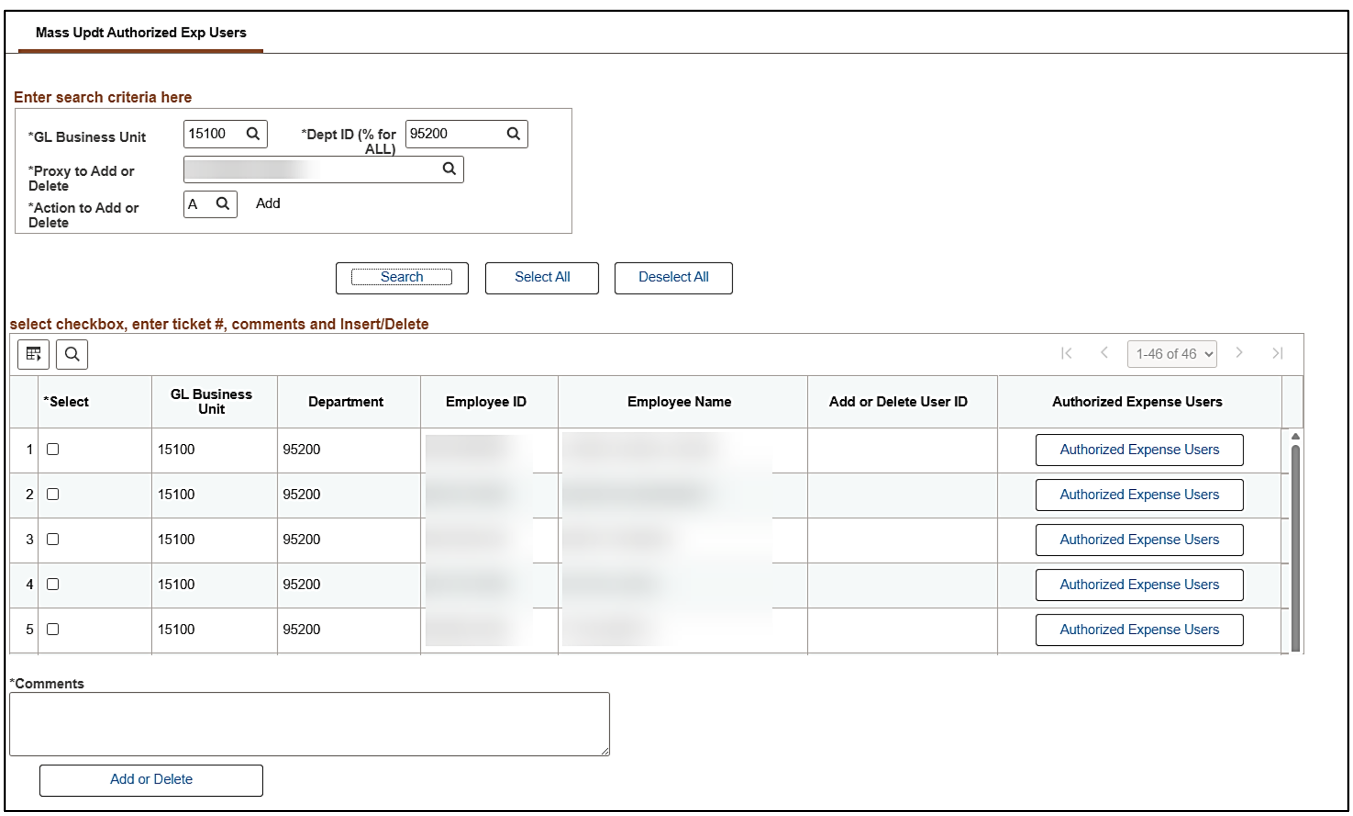
Completing a Mass Update of Authorized Expense Users

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.

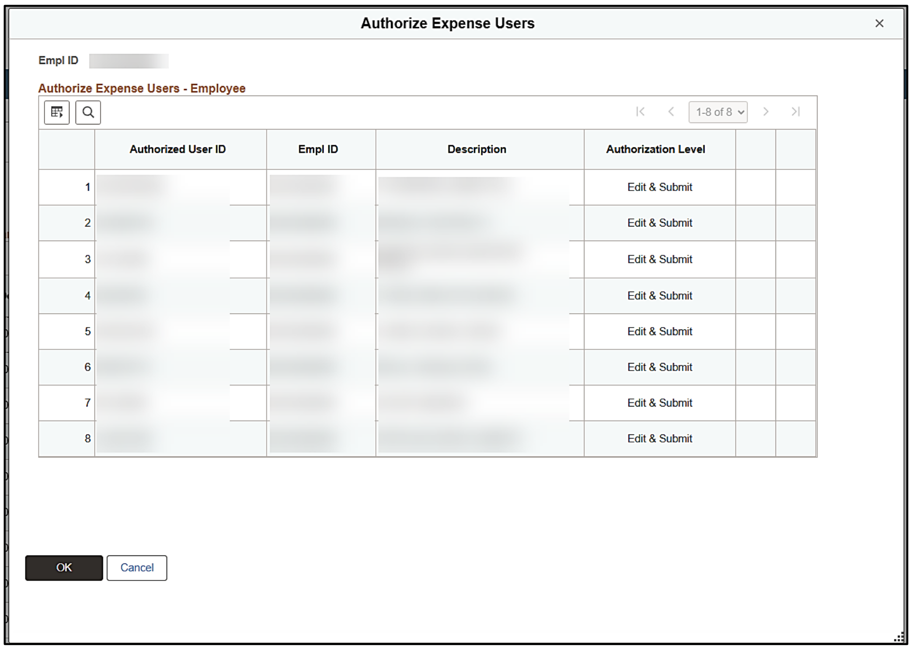
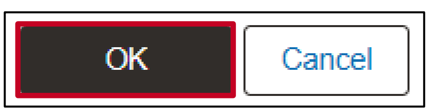
Step	Action
1.	Navigate to the **Mass Updt Authorized Exp Users** page using the following path: **NavBar > Menu > Travel and Expenses > Manage Expenses Security > Mass Updt Authorized users**
	The **Mass Updt Authorized Exp Users** page displays. 
2.	Enter the Business Unit in the **GL Business Unit** 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.

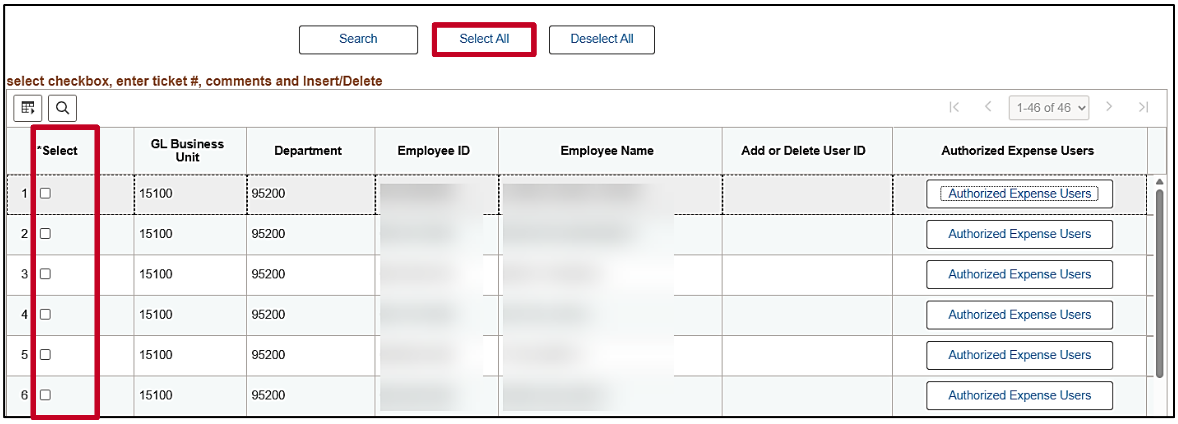
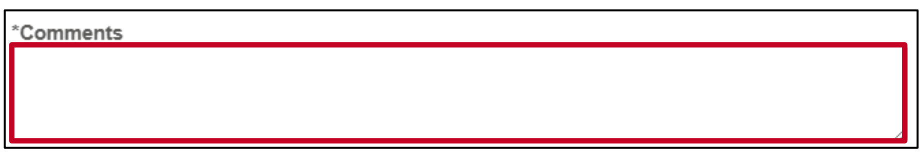
Step	Action
4.	In the **Proxy to Add or Delete** field, enter or select the User ID of the person being added or deleted. 
(i)	In this example, a Proxy is being added for multiple employees.
5.	Enter or select "A" to add or "D" to delete a Proxy in the **Action to Add or Delete** field using the **Look up** icon. For this scenario, "A" is selected. 
6.	Click the **Search** button. 

The search results display at the bottom of the page.

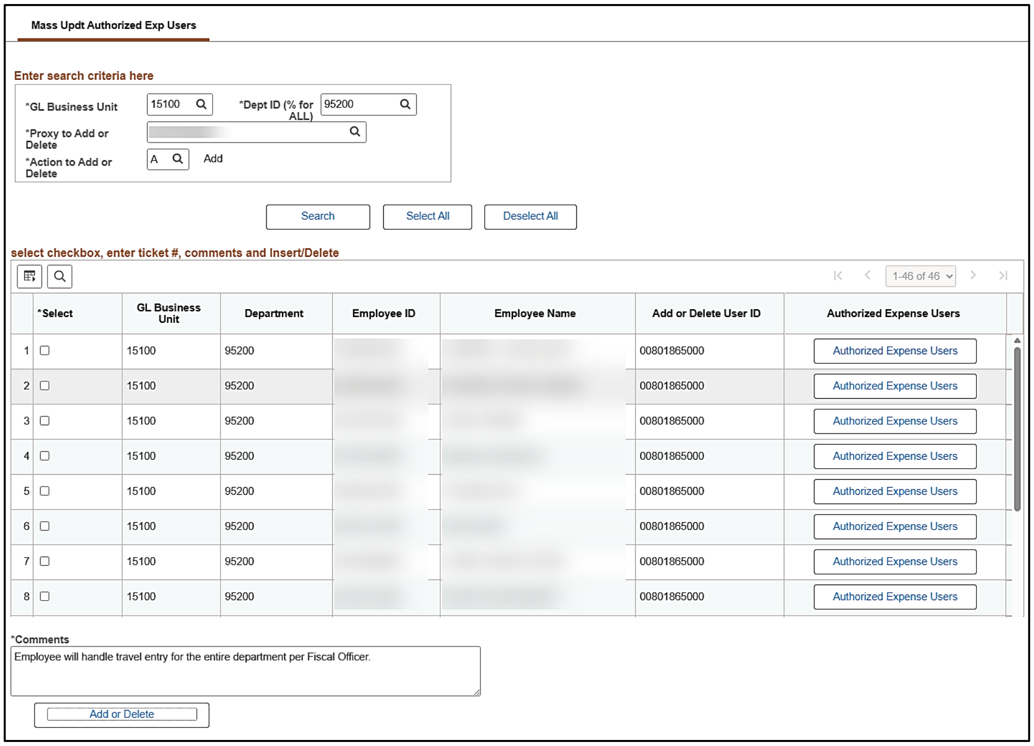


<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the Authorized Expense Users button next to a specific employee to see a list of current authorized users.

</td></tr>
<tr><td colspan="2">The Authorize Expense Users page displays in a pop-up window.

</td></tr>
<tr><td></td><td>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).</td></tr>
<tr><td>8.</td><td>Click the OK button to return.

</td></tr>
</table>

Step	Action
9.	Select the corresponding **Select** checkbox option(s) by the employees for which the Proxy is being added. 
ℹ	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. 

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



	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.