

Assigning Mass P-Card Proxies



Statewide Management, Accounting and Reporting Tool

Purpose

This explains how an Agency P-Card Administrator is able to assign proxies to P-Cards in mass. This would typically be used when a P-Card role needs to be assigned a proxy to multiple cards. If proxy needs to be changed on just a few cards, it may be easier to assign them directly in the Cardholder Profile. The ability to assign proxies is only available to the P-Card Administrator.

Menu Path

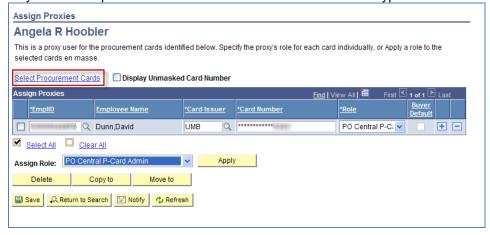
Purchasing > Procurement Cards > Security > Assign Proxies

Procedure

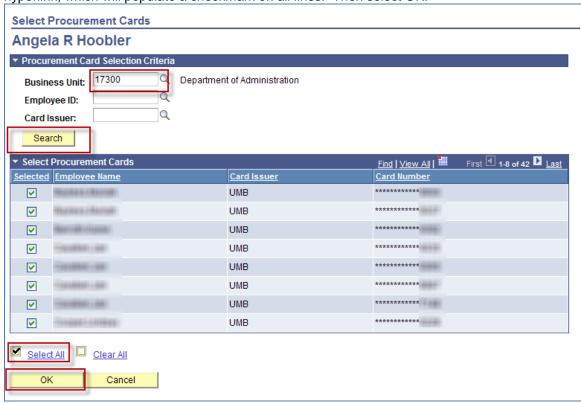
Enter the User ID of the individual for whom you wish to assign proxies. For example, if you want to assign a new P-Card Administrator to all your agency's cards, enter the User ID of the new P-Card Administrator. Enter Search.

| Assign Proxies | | |
|--|-------------------------|--|
| Enter any information you have and click Search. Leave fields blank for a li | | |
| Find an Existing Value | | |
| | | |
| User ID: | begins with ✓ DA00ARH Q | |
| Name: | begins with 🕶 | |
| Case Sensitive | | |
| Search Clear Basic Search | | |

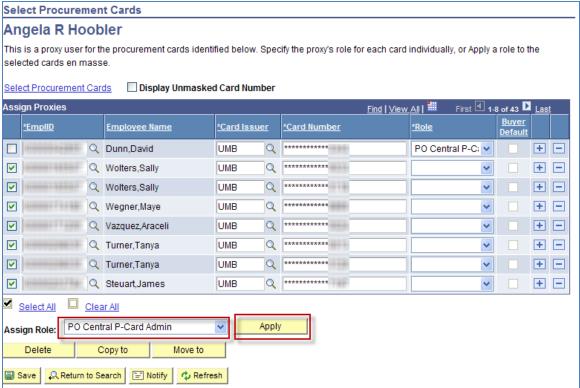
The resulting page will show all cards that this user currently is assigned a proxy. Note there is only one at this point. Click on the Select Procurement Cards hyperlink.



Enter your Business Unit, then select Search. The remaining cards in your agency that this user does not have proxy to will be displayed. Note there are a total of 42. Click on the Select All hyperlink, which will populate a checkmark on all lines. Then select OK.



All 42 lines are now populated on the Assign Proxies page with a checkmark to the left of each line. Identify the role that needs to be assigned as a proxy to these cards, then select the Apply button. In this case, the role is the PO Central P-Card Admin.



The role now is populated for all cards. Note there are now a total of 43 cards this user is assigned a proxy to. Select the Save button to save the changes.

