******State of Kansas**

**Assigning / Removing Mass PCard Proxies**

***Statewide Management, Accounting and Reporting Tool***

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| **Date Created:** | 2/25/2021 |
| **Version:** | 2.0 |
| **Purpose:**  | The ‘Assign Proxies’ page allows an Agency PCard Administrator to assign and remove proxies to PCards in mass. This can assist agencies with the PCard maintenance of assigning a new employee proxy to multiple PCards at the same time or of removing the proxy user IDs of an employee who have left the agency.  |
| **Security:** | The **PO Agency PCard Admin** role is required to perform this function.  |
| **Fluid Navigation:** | Requisitions & PCards > Procurement Cards > Security > Assign Proxies |
| **Classic Navigation:** | Purchasing > Procurement Cards > Manage PCards > Assign Proxies |
| Use the **Search Criteria** to locate the employee that needs to be added or removed as a proxy. Select **Search**.  |  |
| **Assigning a Proxy to PCards in Mass** |
| The resulting page will show all the cards that this user is currently assigned to as a proxy.Click the **Select Procurement Cards** link. |  |
| Click the **Select Procurement Cards** link to display the **ProCard Proxy – Select Cards** page. In the **Procurement Card Selection Criteria** section, enter your agency Business Unit, any other search criteria and select **Search**. |  |
| Select all cards that need to be that the employee needs to be a proxy for individually and click **OK**. |  |
| Selected PCards will pull back into the **Assign Proxies** page for the employee being assigned. If the employee being assigned only has one PCard role, it will get assigned by default.  | C:\Users\sharvey\AppData\Local\Temp\SNAGHTML23bcc9a9.PNG |
| If the employee has more than one PCard role available to them, which role should be used for the Proxy on the cards must be defined. This can be done on each card individually by the **Role** column dropdown options.  | C:\Users\sharvey\AppData\Local\Temp\SNAGHTML23c8865c.PNG  |
| Or the role can be applied to multiple selected PCards at the save time using **Assign Role** and selecting **Apply.**Once the role the user should have for the newly assigned proxy has been defined, select **Save**. |  |
| **Removing a Proxy from PCards in Mass** |
| The resulting page will show all the cards that this user is currently assigned to as a proxy.Select the cards this employee should no longer be a proxy for and click **Delete** and **Save**. | C:\Users\sharvey\AppData\Local\Temp\SNAGHTML23e890ff.PNG |
| If the employee needs to be removed as a proxy from all cards, click the **Select All** link before choosing **Delete** and **Save**. |  |
| The user will be removed as a proxy on all the selected cards.  |  |