

# Mass Proxy Update

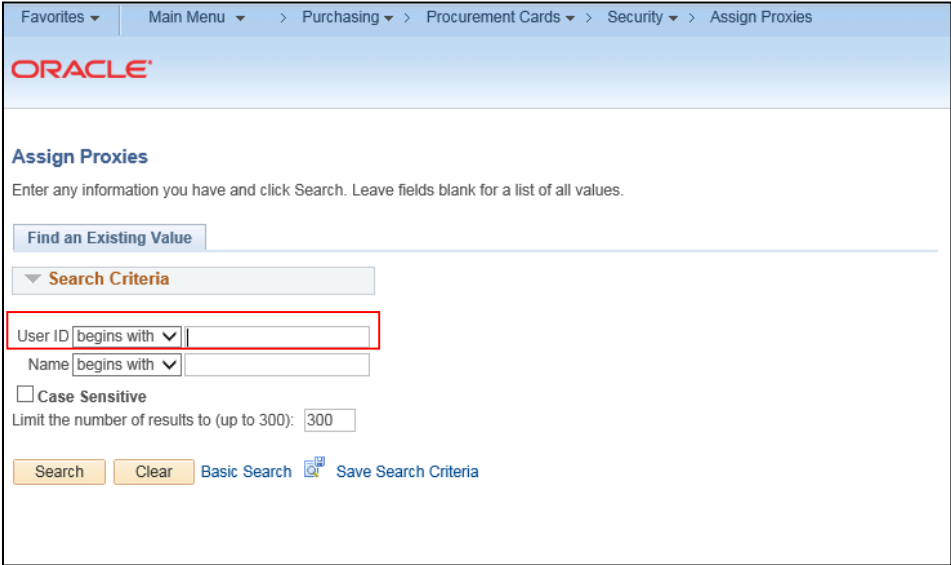
Updated As Of: March 8, 2017

Core-CT Financials 9.2

## Mass Proxy Update

Instead of entering proxies one at a time, use the proxy mass update to add multiple proxies to a card at the same time.

Step	Action
1.	To update the cardholder profile, navigate to the Cardholder Profile Page: <i>Main Menu &gt; Purchasing &gt; Procurement Card &gt; Security &gt; Assign Proxies.</i>
2.	Enter the <b>User ID</b> that will be assigned the proxy role.



## Mass Assign Proxy

Step	Action
3.	Existing Proxies will be displayed



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Step	Action
4.	Click on the Select Procurement Cards Hyperlink <a href="#">Select Procurement Cards</a>

Assign Proxies  
DOC-Jones Karie

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

[Select Procurement Cards](#)

Assign Proxies Personalize | Find | View All | First 1-2 of 2 Last

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role	Requester Default	Buyer Default
<input type="checkbox"/> 008576	Lavigne,Real	JPMC	*****3910	PROGRAM BL	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 965391	Jones,Karie	JPMC	*****5678	General Buyer	<input type="checkbox"/>	<input type="checkbox"/>

Select All  Clear All

Assign Role: General Buyer

Step	Action
5.	Select the Business Unit and click Search

ProCard Proxy - Select Cards Help

Procurement Card Selection Criteria

Business Unit:

Employee ID:

Card Issuer:

Select Procurement Cards Personalize | Find | View All | First 1 of 1 Last


Selected	Employee Name	Card Issuer	Card Number
<input type="checkbox"/>			

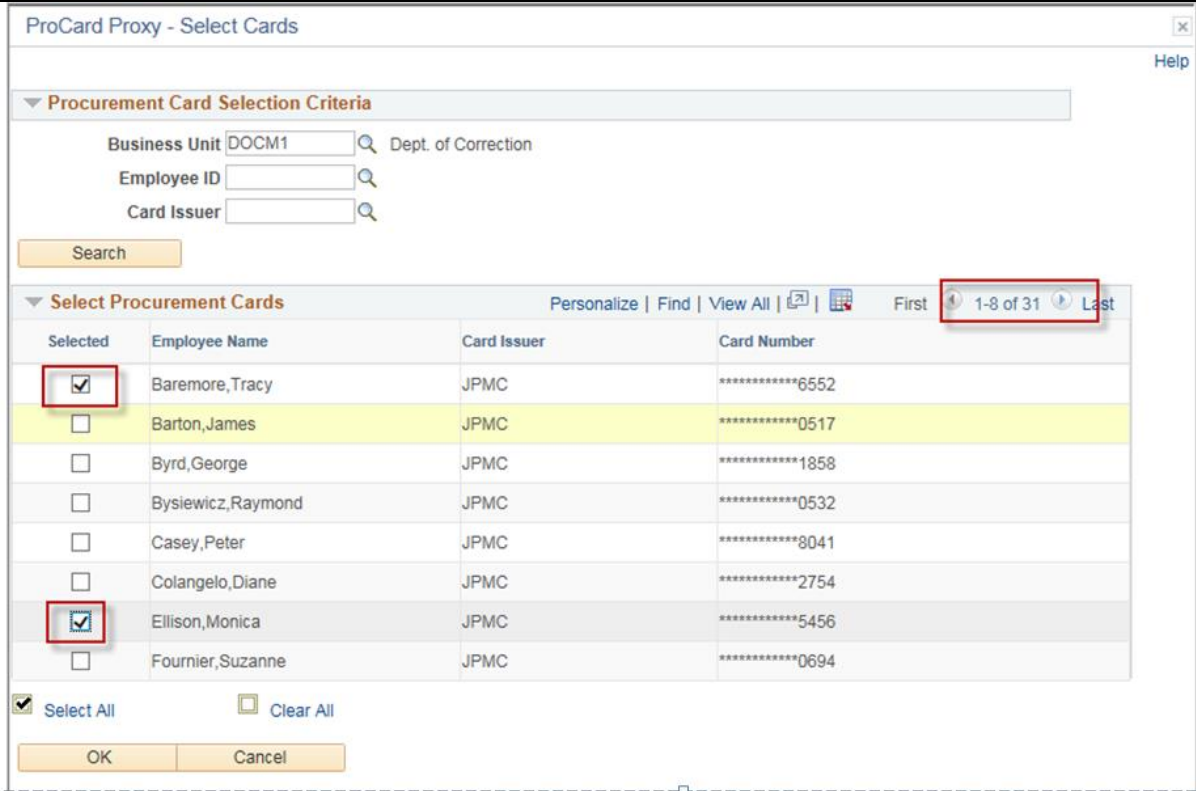
Select All  Clear All

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Step	Action
6.	Select the Cards this user will be assigned Click OK 



ProCard Proxy - Select Cards

Business Unit  Dept. of Correction


Employee ID

Card Issuer

Select Procurement Cards Personalize | Find | View All | First **1-8 of 31** Last

Selected	Employee Name	Card Issuer	Card Number
<input checked="" type="checkbox"/>	Baremore, Tracy	JPMC	*****6552
<input type="checkbox"/>	Barton, James	JPMC	*****0517
<input type="checkbox"/>	Byrd, George	JPMC	*****1858
<input type="checkbox"/>	Bysiewicz, Raymond	JPMC	*****0532
<input type="checkbox"/>	Casey, Peter	JPMC	*****8041
<input type="checkbox"/>	Colangelo, Diane	JPMC	*****2754
<input checked="" type="checkbox"/>	Ellison, Monica	JPMC	*****5456
<input type="checkbox"/>	Fournier, Suzanne	JPMC	*****0694

Select All  Clear All

Step	Action
7.	Select the Role this user will have on the cards Click Apply   



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Navigation: Favorites > Main Menu > Core-CT Financials > Purchasing > Procurement Cards > Security > Assign Proxies

Core-CT Search: All Search [ ] Advanced Search

Home | HRMS Worklist | FIN

My HR | Finance | Core-CT Help

### Assign Proxies

DOC-Jones Karie

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

Select Procurement Cards

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role	Requester Default	Buyer Default		
<input checked="" type="checkbox"/> 512341	Ellison, Monica	JPMC	*****5456		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input checked="" type="checkbox"/> 586650	Baremore, Tracy	JPMC	*****6552		<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Select All  Clear All

Assign Role: **General Buyer** (selected) | Apply

- MULTI REQUESTER(CORE-10)
- PROGRAM BUYER
- PURCHASING MODULE RPT MAKER
- PURCHASING MODULE VIEWER
- REQUESTER

Buttons: Delete, Save, Return, Next in List, Notify, Refresh

Step	Action
8.	The Role has been assigned Click Save



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[My HR](#) [Finance](#) [Core-CT Help](#)

### Assign Proxies

**DOC-Jones Karie**

This is a proxy user for the procurement cards which are define on the page. Specify the proxy's role for each card individually, or Apply a role to the selected cards in mass.

Select Procurement Cards

**Assign Proxies** Personalize | [Find](#) | [View All](#) | | First 1-2 of 2

*Empl ID	Employee Name	*Card Issuer	*Card Number	*Role	Requester Default	Buyer Default
<input checked="" type="checkbox"/> 512341	Ellison, Monica	JPMC	*****5456	General Buyer	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> 586650	Baremore, Tracy	JPMC	*****6552	General Buyer	<input type="checkbox"/>	<input type="checkbox"/>

Select All  Clear All

Assign Role:

Step	Action
9.	<b>End of Procedure.</b>