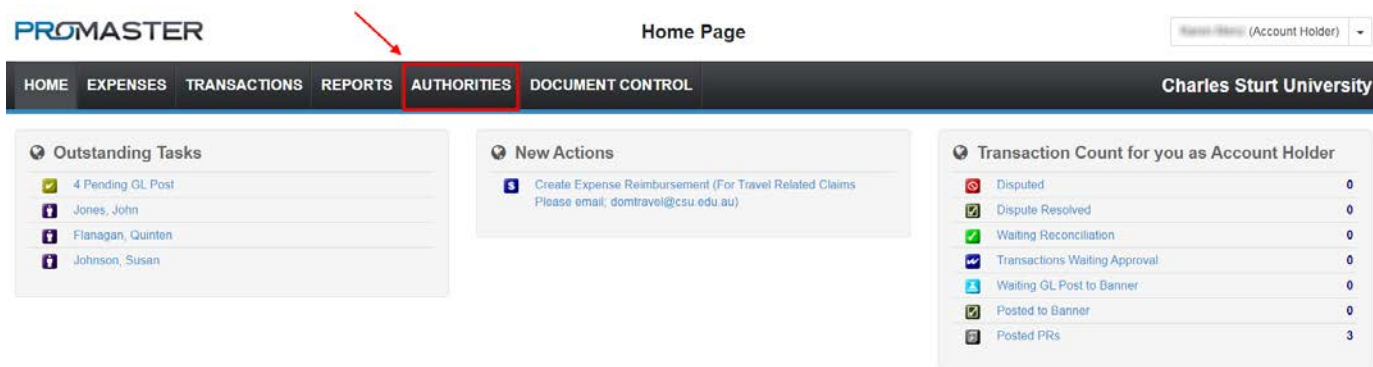


Assigning a delegate to reconcile my Purchase Card transactions

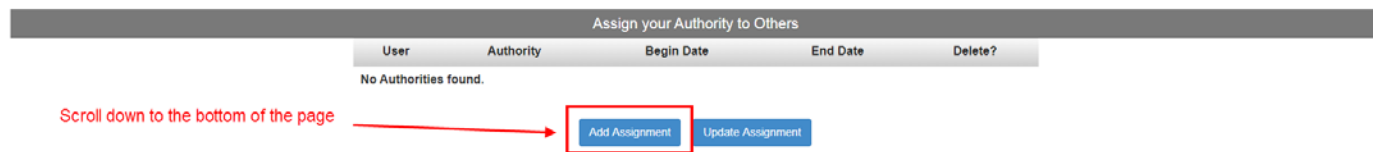
For a variety of reasons, a Cardholder may not be able to reconcile their own transactions. This is most commonly due to the Cardholder taking leave, or where there are dedicated Administrative staff who reconcile and process Cardholder transactions on a regular basis.

In this case, a Cardholder needs to assign their role to another **ProMaster** user for a period of time.

To do this the Cardholder is to log into **ProMaster**. From the Homepage, select the **Authorities** menu at the top of the page.

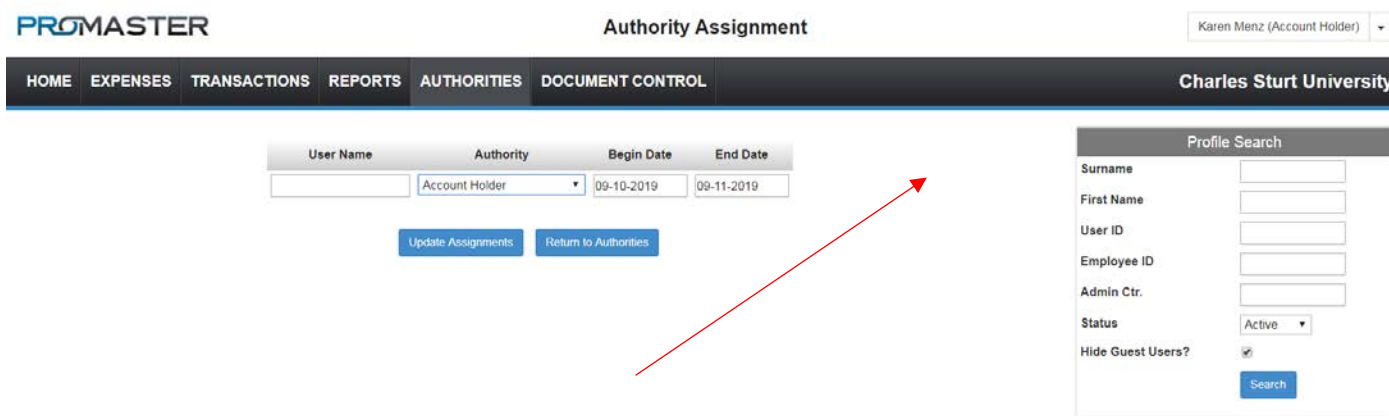


This will open up the **User Authorities** window.



To add a new authority click the **Add Assignment** button.

This will open up the **Authority Assignment** window.



Search for a user by entering their details in the search fields (above) on the right hand side of the screen.

Search results are displayed.

The screenshot shows the PROMASTER Authority Assignment interface. At the top, there is a navigation bar with 'HOME', 'EXPENSES', 'TRANSACTIONS', 'REPORTS', 'AUTHORITIES', and 'DOCUMENT CONTROL'. The user is logged in as 'Karen Menz (Account Holder)'. The main area contains a search form with fields for 'User Name', 'Authority', 'Begin Date', and 'End Date'. Below the form are buttons for 'Update Assignments' and 'Return to Authorities'. To the right, a 'Profile Search' panel shows search criteria: Surname 'smith', First Name, User ID, Employee ID, Admin Ctr., Status 'Active', and 'Hide Guest Users?' checked. A 'Search' button is present. Below the search panel, a list of search results is displayed, with a red arrow pointing to the first result: 'Smith, Angela (99932011)'. Other results include 'Smith, Adelaide (11656404)', 'Smith, Andrew (11491642)', 'Smith, Brent (11374958)', and 'Smith, Janice (11369486)'.

Once your search has brought up a list of names, click on the person you want and this will put the name into the **User Name** field.

This screenshot shows the same interface as the previous one, but with the search results list from the 'Profile Search' panel copied into the 'User Name' field. The text 'JFSMITH' is now in the 'User Name' input box. A red arrow points from the search results list in the previous image to the 'User Name' field in this image. The 'Authority' dropdown is still set to 'Account Holder', and the 'Begin Date' and 'End Date' fields remain '09-10-2019' and '09-11-2019' respectively. The 'Update Assignments' and 'Return to Authorities' buttons are still visible.

Click on the drop down arrow for the type of **Authority** and select **Account Holder**.

Click in the **Begin Date** field and a calendar will open up. Select the commencement date from the calendar and this will be put in the **Begin Date** field. Do the same thing for the **End Date**.

Once the correct dates have been selected, click on the button to **Update Assignments** to add this to your assigned authorities list.

This image is a close-up of the Authority Assignment form. It shows the 'User Name' field containing 'JFSMITH', the 'Authority' dropdown set to 'Account Holder', the 'Begin Date' field with '09-10-2019', and the 'End Date' field with '09-11-2019'. Below the form, two buttons are visible: 'Update Assignments' and 'Return to Authorities'. The 'Update Assignments' button is highlighted with a red rectangular box.