Department Security Administrators (DSAs) are given access to the Express System Admin Tool (SAT) by an Express Administrator in Travel Accounting. This access allows a DSA to manage their departments or “User Groups” (based on Department FS codes). DSAs can use SAT to assign Department Proxy or Individual Proxy access to employees in the departments they manage.

DSAs should only perform SAT functions that are SPECIFICALLY instructed in this guide. Altering any other fields or information can cause serious disruptions or failure of the system to operate properly.

To access SAT, log into Express and click on the “My Inbox” tab.

After opening your Inbox, click the arrow next to your name in the upper right corner to open the drop down menu. Select the Admin link. The Admin link will only appear in the drop down menu from the Inbox screen, not from the Express Home page. If you are a DSA and do not see the Admin link, please contact Travel Accounting for access.
Clicking the Admin link will take you to the System Admin Tool (SAT) page. SAT can now be launched directly in your internet browser window. Click “Launch HTML SAT” to open SAT. If you have recently performed a task, you can also launch SAT by clicking on the “Users: Proxy Permission” task to go directly to that screen.

If you are a DSA for multiple groups, you will be prompted to select an Admin group before launching SAT.

Clicking Launch HTML SAT will open a new window and first take you to a Welcome screen. Click the “Users” link towards the top left of the screen.
Select “Proxy Permission” from drop down menu on the right side of the screen. Proxy Permission is the only task available to DSAs. Click the “Show Tab” button to open this task. The tab will appear automatically after the first time you select it.

Reminder: DSAs will see other “User: Proxy Permissions” functions, but should only perform SAT functions that are SPECIFICALLY instructed in this guide. Altering any other fields or information can cause serious disruptions or failure of the system to operate properly. NEVER change the status of a user. Accounts are automatically inactivated for separated employees. If a separated employee is re-instated, re-register them on the Express home page.

To set up new proxy access, click the “New” button on the right side of the screen.
Click the binoculars icon next to the first field ("User") to search for the user that you would like to set up as a proxy. Users recently searched for will also appear in the drop down menu.

Use the “Main” tab to enter search parameters for the user that you would like to set up as a proxy. It is recommended that DSAs use the First Name, Last Name, Employee ID (9-digit UID) and/or Location (4-digit department code/FS code) fields for searching. Leaving the fields blank will search all users. The asterisk (*) can also be used as a wildcard when searching. Do not use the Application or Permission tabs for searching. Enter search criteria, then click “Search.”
Matching search results will show on the right side of the screen. You can click the magnifying glass icon to view further details about the user. Click the “Pick” link next to the name you would like to assign proxy access to.

This will fill in the User on the Primary Information screen.
Once the User is entered, select “Create” from the Action drop down. DSAs will see “Review” in the Action drop down, but this WILL NOT set up a department reviewer. Department reviewers are still assigned in DACSS, not SAT. Create is the only Action a DSA should select on this screen. Select “Expense Report” (the only option) from the Application drop down. The Status drop down should already be filled in based on the user’s employment status. DO NOT change the Status for any user. If the user is Inactive, you will not be able to assign access.

If you want to set up proxy access for a specific individual, enter that user in the “For User” field. If you want to set up proxy access for an entire department code (most common setup), enter that FS code in the “For Group” field. Use the binoculars icon to search for users or department codes like you did before. When searching for department codes, you can also use the description field to type the department name. Use wildcards unless you are certain of the exact name. Pick the user or department code you want to assign proxy access to.

Make sure all fields with a red asterisk are completed. “For User” should be filled in for individual proxy set up and “For Group” should be filled in for department proxy set up. Click “Save” to update the changes. In the example below, Marlow McCurdy would be able to create expense reports for all users in department 3585.
Saving will take you back to the “Proxy Permission” screen you started from. This screen also allows you to search within your admin group. Search for “User” to view or edit their current proxy access. In the example below, Alexandra has proxy access to create expense reports for Barbara.

![Proxy Permission Screen](image1)

Search “For User” or “For Group” to see who has proxy access for that specific user or group. In the example below, 4 users have department proxy access for department code 3585.

![Proxy Permission Screen](image2)

Click the buttons to the left of the User name to view user details, copy proxy access to another user or edit the user’s current proxy access.

![Proxy Permission Screen](image3)