



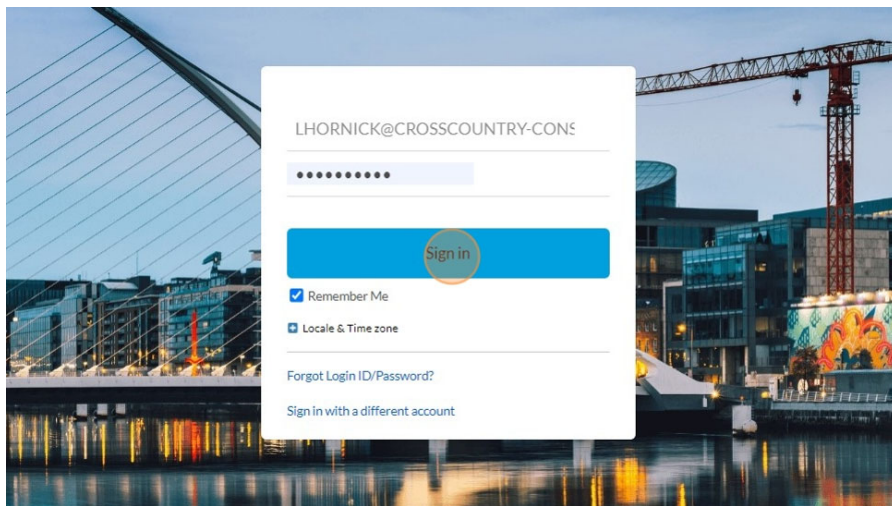
DATABASICS - Assign a Proxy for Expense Reimbursement Requests

Overview

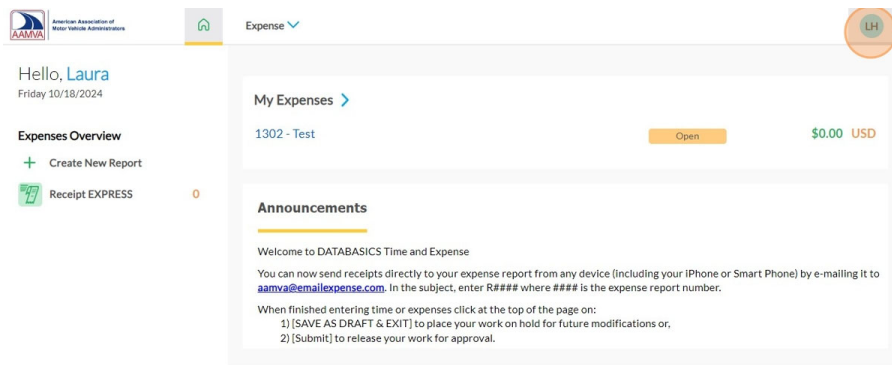
This document is a means to guide users on assigning a Proxy to submit DATABASICS expense reimbursement requests on behalf of travelers.

User Guide

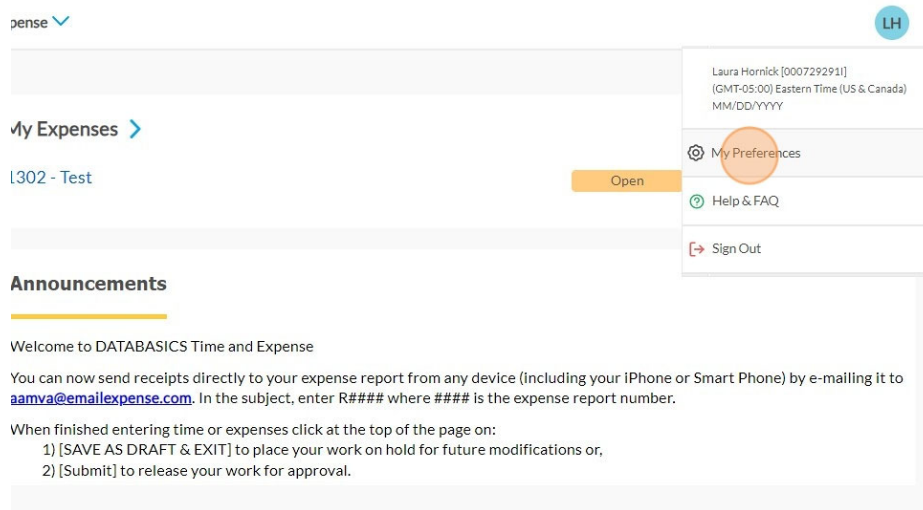
1. Navigate to <https://site10.data-basics.net/aamva00534/databasics.ext>
2. Input your login credentials and Click "Sign in".



3. Navigate to the upper right and click on your initials.

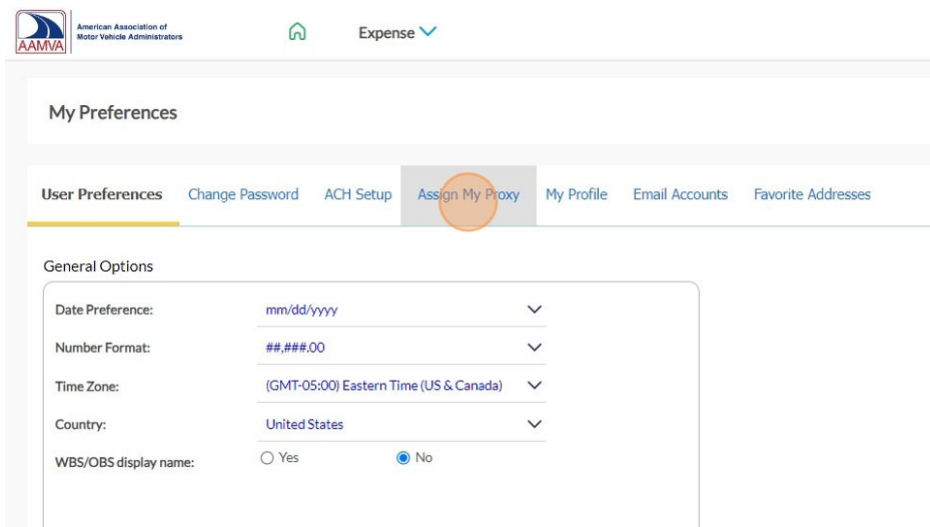


4. Click "My Preferences".



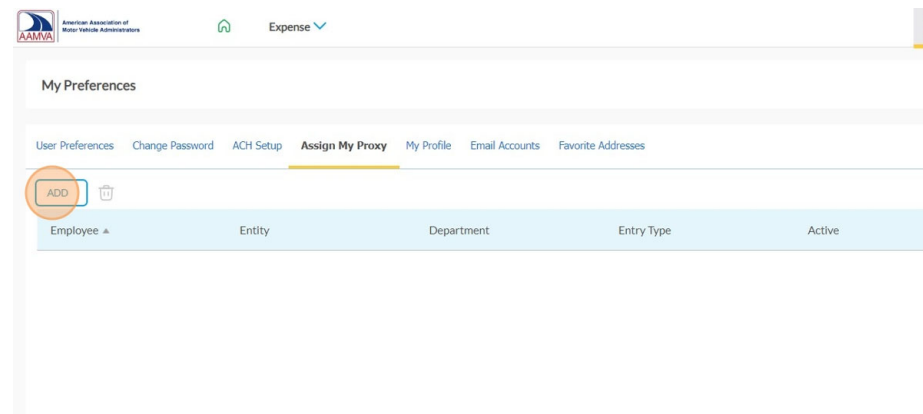
The screenshot shows a user interface with a profile dropdown menu. The user's name is Laura Hornick [0007292911] (GMT-05:00) Eastern Time (US & Canada) MM/DD/YYYY. The dropdown menu includes options for "My Preferences", "Help & FAQ", and "Sign Out". The "My Preferences" option is highlighted with an orange circle. Below the menu, there is a section for "Announcements" with a welcome message and instructions on how to submit expense reports.

5. Click "Assign My Proxy" tab.



The screenshot shows the "My Preferences" page. The "Assign My Proxy" tab is selected and highlighted with an orange circle. The page displays various settings under "General Options", including Date Preference (mm/dd/yyyy), Number Format (##,###.00), Time Zone ((GMT-05:00) Eastern Time (US & Canada)), Country (United States), and WBS/OBS display name (No).

6. Click "ADD" to insert a row and find the non-employee user's name.



The screenshot shows the "My Preferences" page with the "Assign My Proxy" tab selected. A table is displayed with columns for Employee, Entity, Department, Entry Type, and Active. An "ADD" button is highlighted with an orange circle, indicating the next step in the process.

- Click in the "Employee" text field and search for a non-employee user to assign as your proxy.
Note: Enter the non-employee user's first name or last name (not both) and allow the database time to pull back results. The most unique name will reduce the selection options. Be sure to scroll through if there are multiple pages of results.

My Preferences

User Preferences Change Password ACH Setup **Assign My Proxy** My Profile Email Accounts Favorite Addresses

ADD

Employee	Entity	Department	Entry Type
	Autofill field	Autofill field	Same As My Group

Save Cancel

- Choose the non-employee user you would like to make your proxy.
Note: The "Employee" must have an AAMVA account to be selected from the options list.

Employee Entity Department Entry Type

Batchelor, Brent Autofill field Autofill field Same As My Group

Batchelor, Brent Non-Employee Non-Employee
Bennett, Brent Non-Employee Non-Employee
Cain, Brent Non-Employee Non-Employee
Caron, Brent Non-Employee Non-Employee
Clarke, Brent Non-Employee Non-Employee
Connolly, Brent Non-Employee Non-Employee
Culler, Brent Non-Employee Non-Employee
Darrah, Brent Non-Employee Non-Employee
Darsch, Brent Non-Employee Non-Employee
Downs, Brent Non-Employee Non-Employee
Ericson, Brent Non-Employee Non-Employee
Harding, Brent Non-Employee Non-Employee
Hoffman, Brent Non-Employee Non-Employee
Hogelin, Brent Non-Employee Non-Employee
Iles, Brent Non-Employee Non-Employee
Jarvis, Brent Non-Employee Non-Employee

Save Cancel

- The "Entity" and "Department" fields will auto-populate to "Non-Employee".

My Preferences

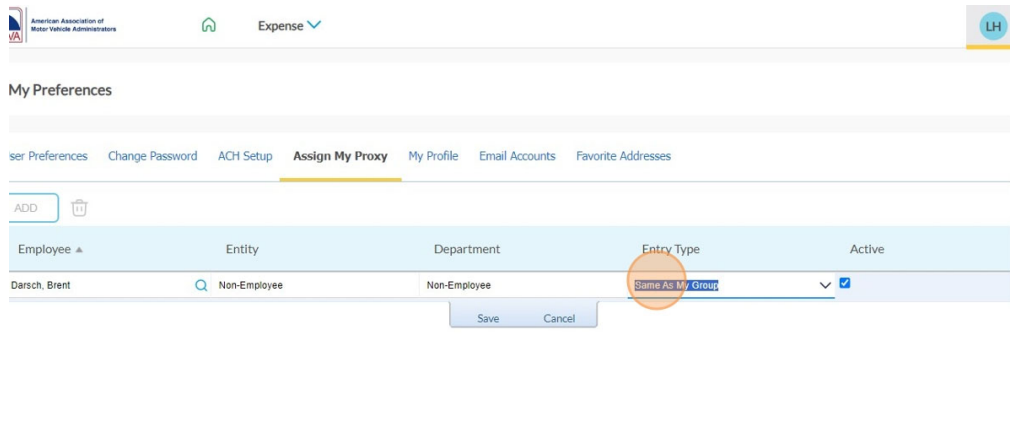
User Preferences Change Password ACH Setup **Assign My Proxy** My Profile Email Accounts Favorite Addresses

ADD

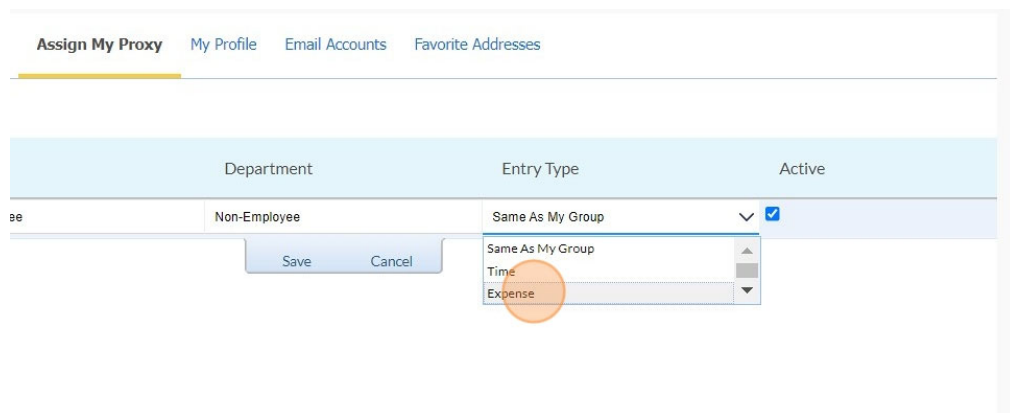
Employee	Entity	Department	Entry Type	Active
Darsch, Brent	Non-Employee	Non-Employee	Same As My Group	<input checked="" type="checkbox"/>

Save Cancel

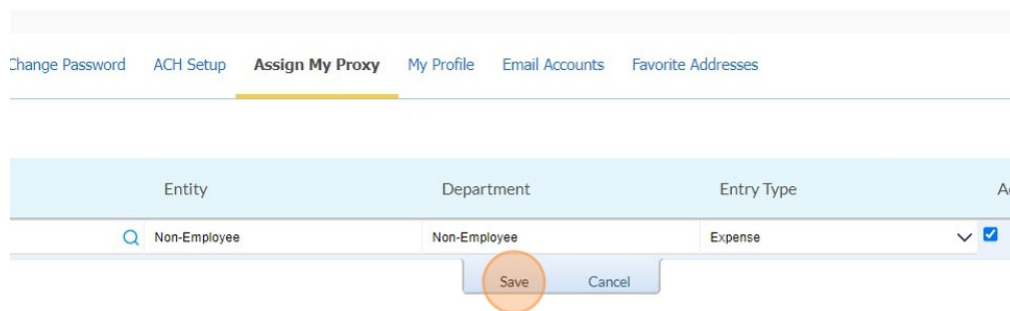
10. Click into the "Entry Type" field.



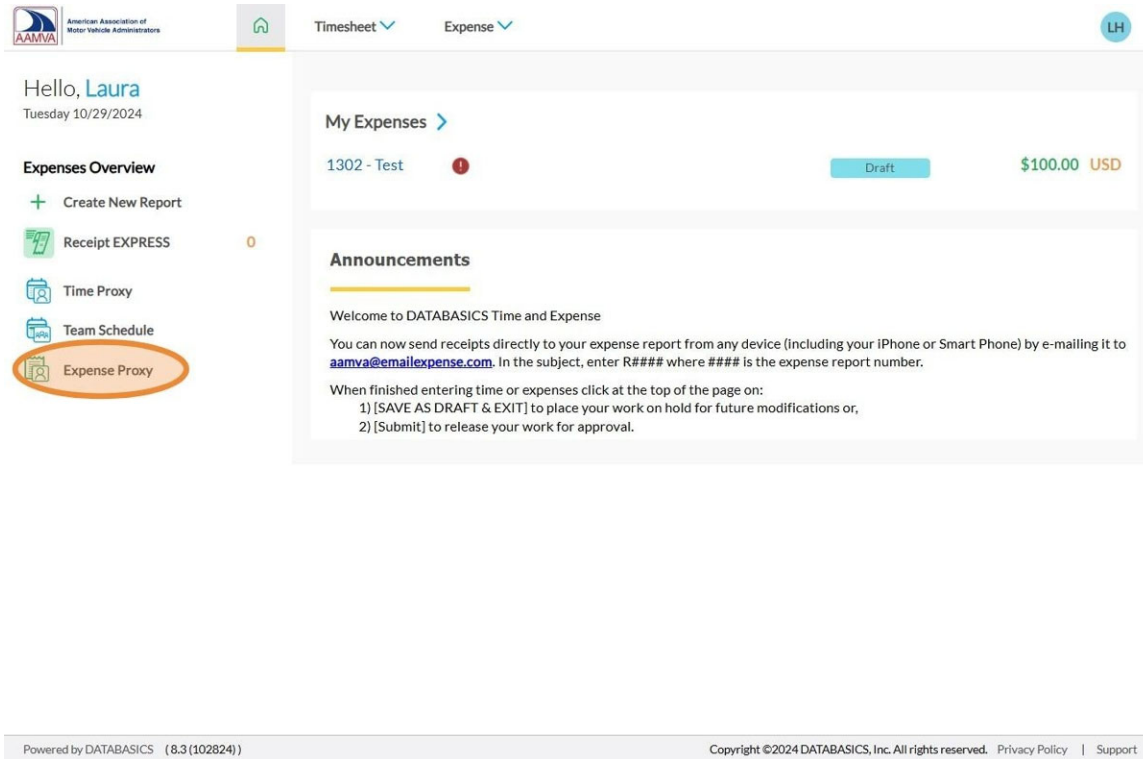
11. You MUST choose "Expense" from the "Entry Type" drop-down choices.



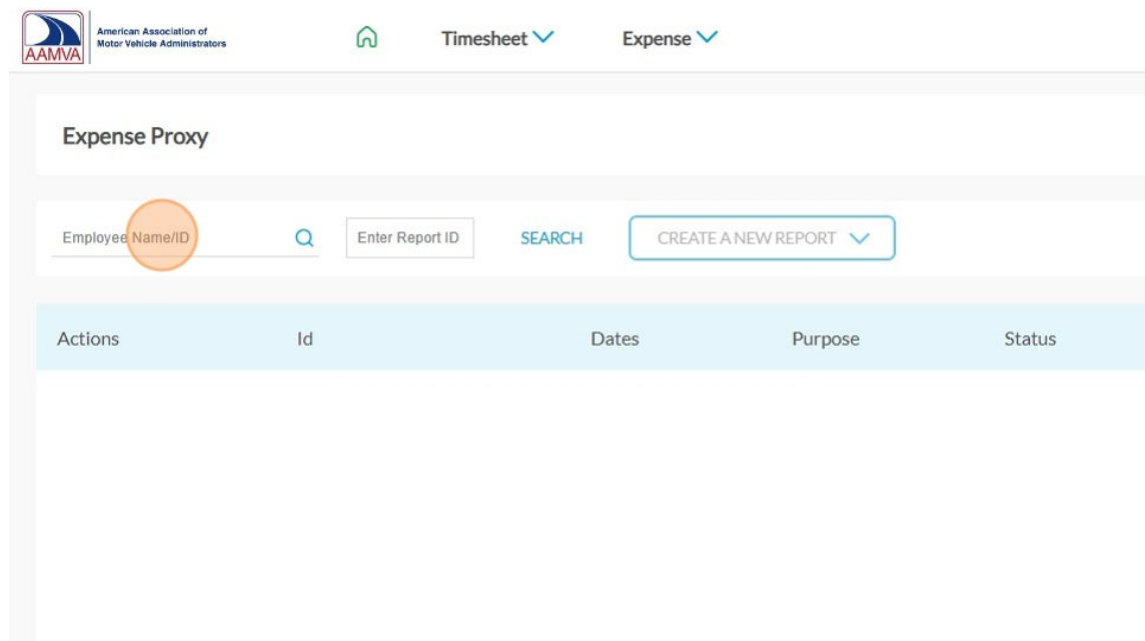
12. Click "Save". The Non-Employee user selected will now have authorization to input expense reimbursement reports on your behalf when signing into their instance of DATABASICS.



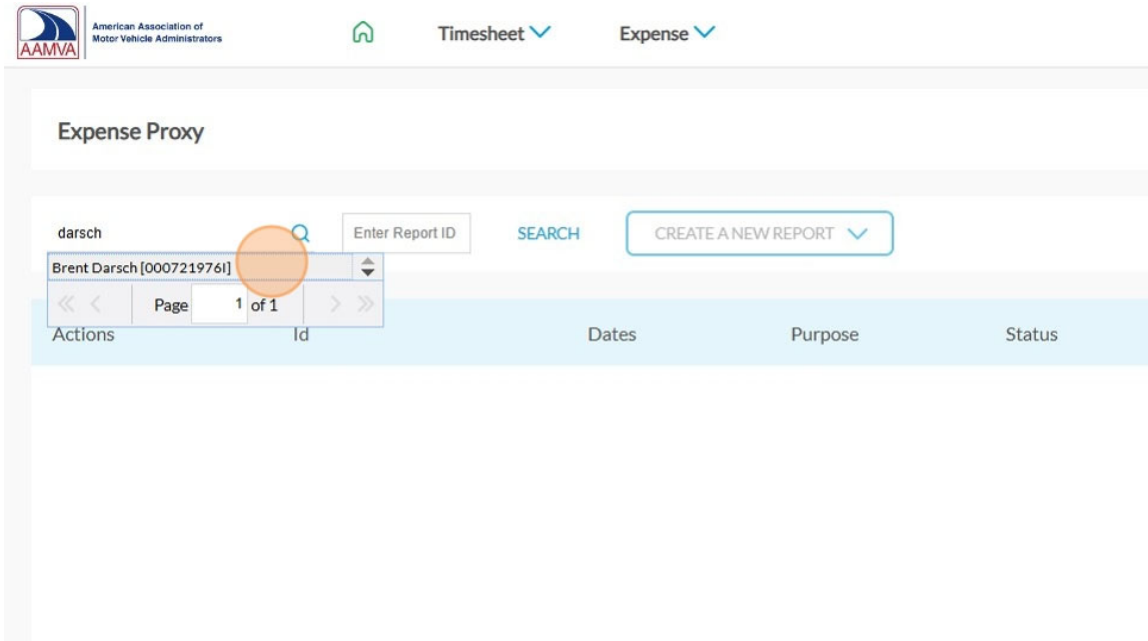
13. The designated proxy will now see "Expense Proxy" on the left-hand navigation of the home screen when signing-in. Click "Expense Proxy".



14. Click in "Employee Name/ID" and enter the non-employee user's first name or last name (not both). The designated proxy will then see the traveler's name for whom they are completing the expense report.

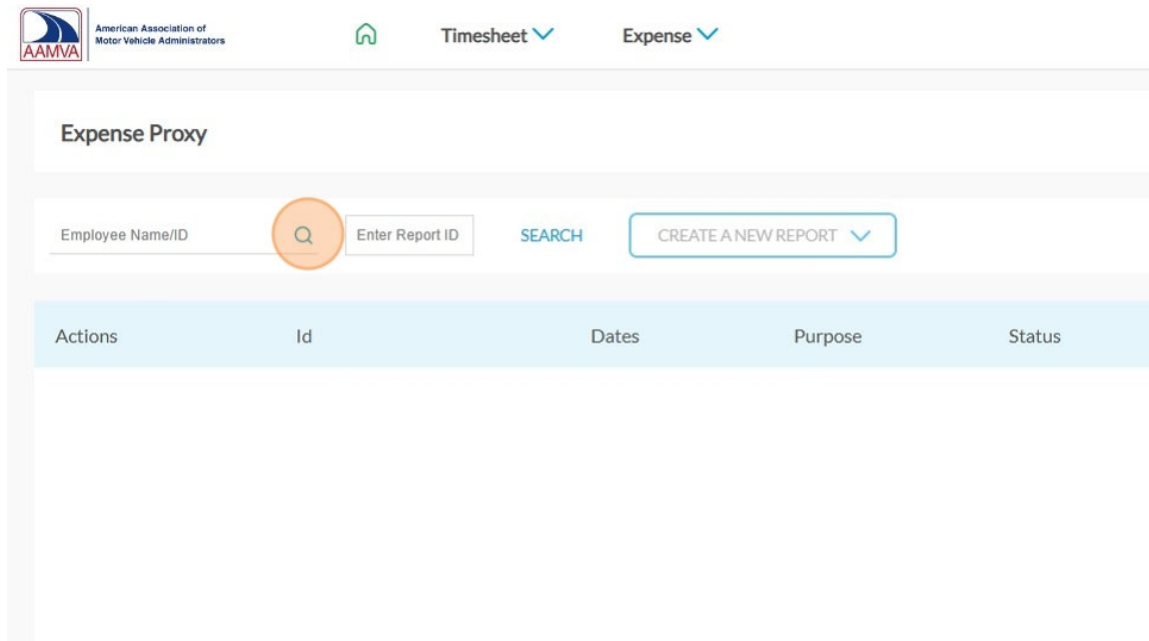


15. Choose the traveler's name for whom the expense report is being created, this will allow "CREATE A NEW REPORT" to be selected.



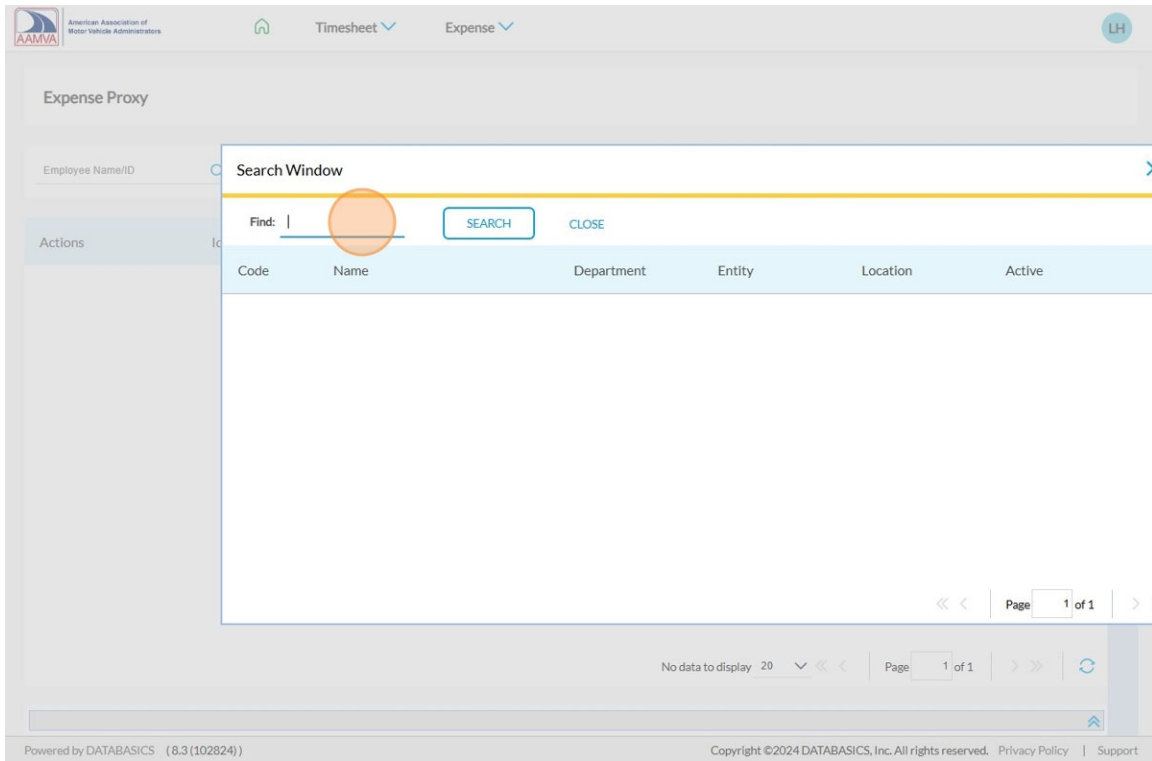
The screenshot shows the 'Expense Proxy' interface. At the top left is the AAMVA logo. The navigation bar includes a home icon, 'Timesheet' with a dropdown arrow, and 'Expense' with a dropdown arrow. Below the navigation bar, the page title 'Expense Proxy' is displayed. The main content area features a search bar with the text 'darsch' and a magnifying glass icon. To the right of the search bar is an 'Enter Report ID' input field, a 'SEARCH' button, and a 'CREATE A NEW REPORT' button with a dropdown arrow. A dropdown menu is open below the search bar, showing the selected item 'Brent Darsch [0007219761]'. Below the dropdown menu is a pagination control showing 'Page 1 of 1'. Below the pagination control is a table header with columns: 'Actions', 'Id', 'Dates', 'Purpose', and 'Status'.

16. Alternatively, Click the magnifying glass.

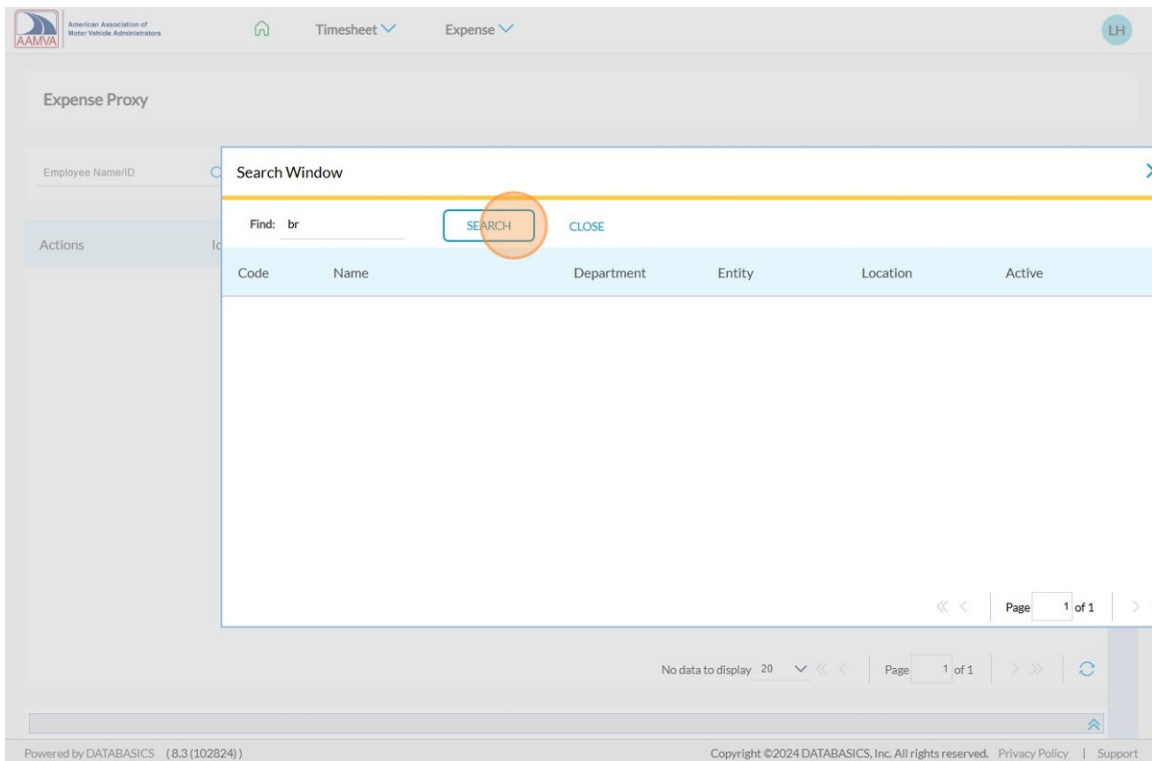


The screenshot shows the 'Expense Proxy' interface. At the top left is the AAMVA logo. The navigation bar includes a home icon, 'Timesheet' with a dropdown arrow, and 'Expense' with a dropdown arrow. Below the navigation bar, the page title 'Expense Proxy' is displayed. The main content area features a search bar with the text 'Employee Name/ID' and a magnifying glass icon. To the right of the search bar is an 'Enter Report ID' input field, a 'SEARCH' button, and a 'CREATE A NEW REPORT' button with a dropdown arrow. Below the search bar is a table header with columns: 'Actions', 'Id', 'Dates', 'Purpose', and 'Status'. The magnifying glass icon in the search bar is highlighted with an orange circle.

17. Click in the "Find" field and type in any part of the user's name.



18. Click search to pull up all the options of the letters typed in.



19. Review the resulting criteria and click the check mark of the desired user.

The screenshot shows the 'Expense Proxy' interface with a 'Search Window' overlay. The search criteria is 'br'. A table lists search results with columns: Code, Name, Department, Entity, Location, and Active. One result is shown for Brent Darsch. A 'Select' button with a checkmark icon is highlighted next to the result. The footer includes 'Powered by DATABASICS (8.3(102824))' and 'Copyright ©2024 DATABASICS, Inc. All rights reserved. Privacy Policy | Support'.

Code	Name	Department	Entity	Location	Active
00072197...	Brent Darsch	Non-Employee	Non-Employee	AAMVA	Yes

20. Click "CREATE A NEW REPORT".

The screenshot shows the 'Brent Darsch' report page. At the top, there is a search bar with 'Brent Darsch' and a 'SEARCH' button. Next to it is a 'CREATE A NEW REPORT' button with a dropdown arrow, which is highlighted with an orange circle. Below the search bar is a table with columns: Actions, Id, Dates, Purpose, Status, Amount, Due, and Total. One row is visible with Id '1398', Dates '10/25/2024 - 10/...', Purpose 'test', and Status 'DRAFT'. The footer includes 'Powered by DATABASICS (8.3(102824))' and 'Copyright ©2024 DATABASICS, Inc. All rights reserved. Privacy Policy | Support'.

Actions	Id	Dates	Purpose	Status	Amount	Due	Total
	1398	10/25/2024 - 10/...	test	DRAFT			

21. Choose "Expense Report" from the drop-down.

The screenshot shows the AAMVA web application interface. At the top, there is a navigation bar with the AAMVA logo, a home icon, and tabs for "Timesheet" and "Expense". A user profile icon labeled "LH" is in the top right. Below the navigation bar, the user's name "Brent Darsch" is displayed. A search bar contains "Brent Darsch" and "Enter Report ID". A "CREATE A NEW REPORT" button with a dropdown arrow is visible. A table with columns "Actions", "Id", "Date", "Expense Report", "Status", "Amount", "Due", and "Total" is shown. A dropdown menu is open over the "Expense Report" column, with "Agency Report" and "Expense Report" options. The "Expense Report" option is highlighted with an orange circle. A row in the table shows "1398" as the ID, "10/25/2024 - 10/..." as the date, "test" as the expense report name, and "DRAFT" as the status.

22. Create an expense Report Cover Page and click "CREATE REPORT".

The screenshot shows the "Create New Report: [XP] Expense Report" form. The "Report Cover Page" section includes the following fields:

- *Purpose: Test Proxy Expense Report
- *City: ARLINGTON [ARLINGTON COUNTY]-VA
- Choose Your Member Jurisdiction: Virginia
- Notes: Text Proxy

Below the form, there is a toolbar with buttons for "ADD", "COPY & ADD", "DISTRIBUTE EVENLY", "IMPORT", and a star icon. A table with columns "Project", "Class", "% Allocation", and "Notes" is displayed. The table contains one row with "P00455" as the project, "906" as the class, and "100.00" as the allocation. A "CREATE REPORT" button is highlighted with an orange circle at the bottom of the form. The footer of the page includes "Powered by DATABASICS (8.3 (102824))" and "Copyright ©2024 DATABASICS, Inc. All rights reserved. Privacy Policy | Support".

23. The non-employee's name that the expense report is being created for will be displayed in the header. Complete the expense report per the Expense Reimbursement user guide.

The screenshot shows a web application interface for creating an expense report. At the top left is the AAMVA logo (American Association of Motor Vehicle Administrators). The navigation bar includes 'Timesheet' and 'Expense' menus. The user's name 'Brent Darsch' is displayed in a blue circle in the top right. The main header shows '1442 - Test Proxy Expense Report' and 'Brent Darsch' (circled in orange). Action buttons for 'SAVE AS DRAFT & EXIT' and 'SUBMIT' are present. Below the header is a search bar with the text 'Type at least two characters to search'. A dropdown menu is open, listing expense categories: Receipt EXPRESS (0), Air/Rail Transportation, Auto Rental, Gas, Tolls, Parking, Local Transportation, Lodging, Meals & Incidentals, Mileage, Non-GSA Per Diem, Phone/Internet, and Travel Assistance - Auto Rental. To the right of the dropdown is a table with columns 'Notice', 'Amount', and 'Due'. At the bottom right, the total amount is shown as '\$0.00 USD'. The footer contains 'Powered by DATABASICS (8.3 (102824))' and 'Copyright ©2024 DATABASICS, Inc. All rights reserved. Privacy Policy | Support'.