

Shared: Proxy Logon

User Guide for Concur Standard Edition

Last Revised: December 17, 2019

Applies to these SAP Concur solutions:

- Expense
 - Professional/Premium edition
 - Standard edition

 - Travel
 - Professional/Premium edition
 - Standard edition

 - Invoice
 - Professional/Premium edition
 - Standard edition

 - Request
 - Professional/Premium edition
 - Standard edition
-

Table of Contents

- Section 1: About This Guide1**
- Section 2: Permissions1**
- Section 3: Overview1**
 - What is a Proxy?.....1
 - Before You Begin2
 - What the Proxy Sees.....3
- Section 4: Use Proxy Logon4**
 - Accessing the Expense Proxy Logon Tool4
 - Exiting Expense Proxy Logon.....5
 - Manage Expense Reports or Invoices.....6
 - Modifying Profile for an Employee6
- Section 5: Auditing Proxy Actions6**

Revision History

Date	Notes/Comments/Changes
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
April 27, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 15, 2020	Updated the copyright; no other changes; cover date not updated
December 17, 2019	Removed references to the deprecated 'pause while "Acting As" another user' feature.
March 26, 2019	Updated "payment request" to "invoice". Updated "Concur" to "SAP Concur". Updated images.
February 1, 2019	Updated the copyright; no other changes; cover date not updated
April 17, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
March 15, 2018	Updated the copyright; no other changes; cover date not updated
November 4, 2017	Updated guide to include new Product Settings page, which replaces the Setup Wizard.
March 18, 2017	Updated with menu option name change to access Setup Wizard.
December 15, 2016	Changed copyright and cover; no other content changes.
October 16, 2015	Updated information about the Profile menu and proxy ability to access the Administration menu.
February 6, 2015	New document.

Proxy Logon

Section 1: About This Guide

Both Invoice and Expense use the Proxy Logon feature. This guide describes the feature for both products.

Section 2: Permissions

Any user with the *Can Administer* role for Expense or the *Is Invoice Admin* role for Invoice can use the proxy logon feature. As an administrator, you will be able to assist all users in all groups and in all countries.

Section 3: Overview

Proxy Logon is a troubleshooting and training feature that allows you as an administrator to see what a user sees for the purpose of guiding the user in performing tasks.

What is a Proxy?

As a Proxy, you may perform these tasks:

NOTE: In this guide, a Proxy refers to you as an administrator during the time that you are administering for another user.

- Create an expense report or an invoice
- View, edit, and delete expense reports or invoices
- Submit an expense report or an invoice
- Print an expense report or an invoice
- Modify an employee's information in **Profile Settings**

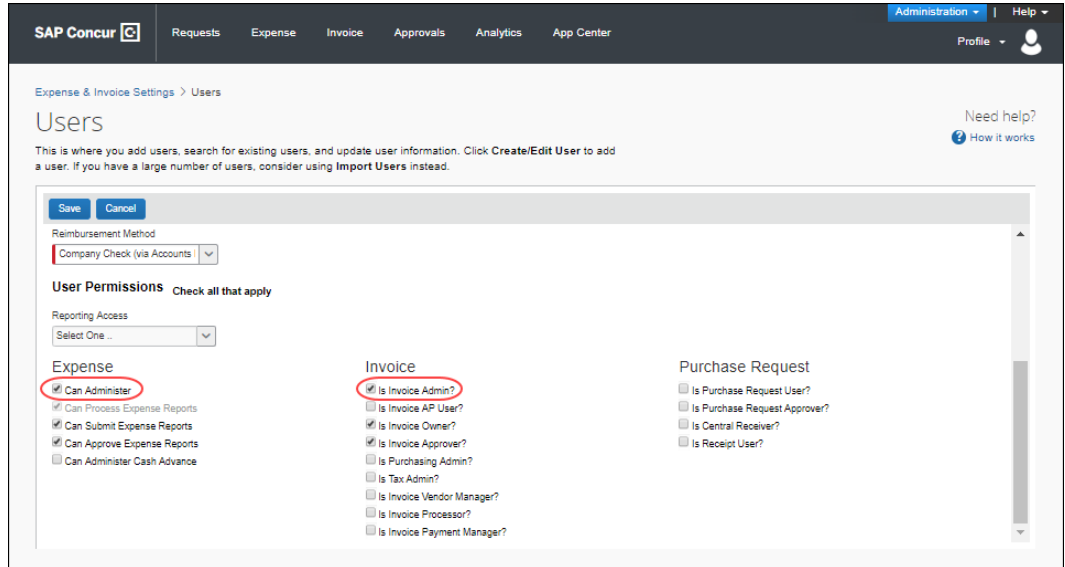
As a Proxy, you are restricted to the features and tasks that the employee for whom you are acting can perform.

NOTE: A Proxy cannot approve reports and invoices, change passwords, or view details of personal cards and personal card charges.

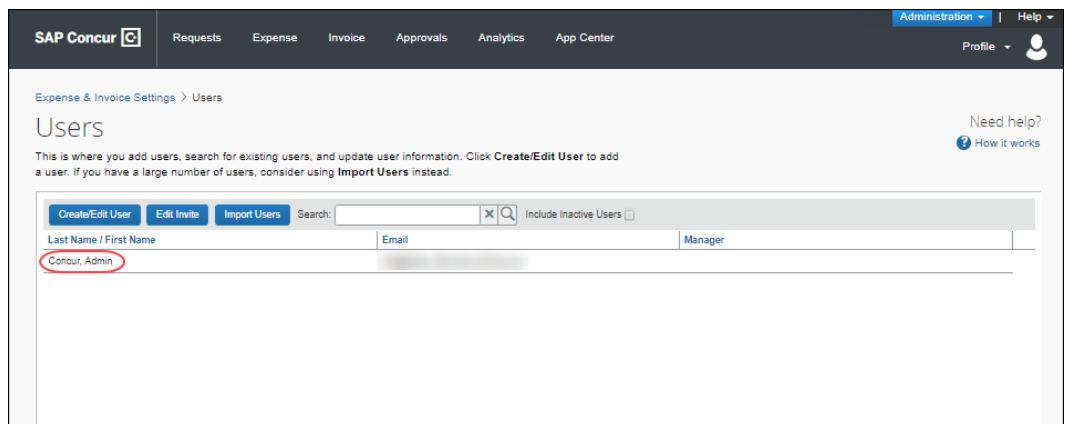
Before You Begin

To act as a proxy on behalf of another employee, the following must be true:

- The proxy must be assigned the *Can Administer* role in Expense or the *Is Invoice Admin* role in Invoice in the **Users** page of Product Settings.

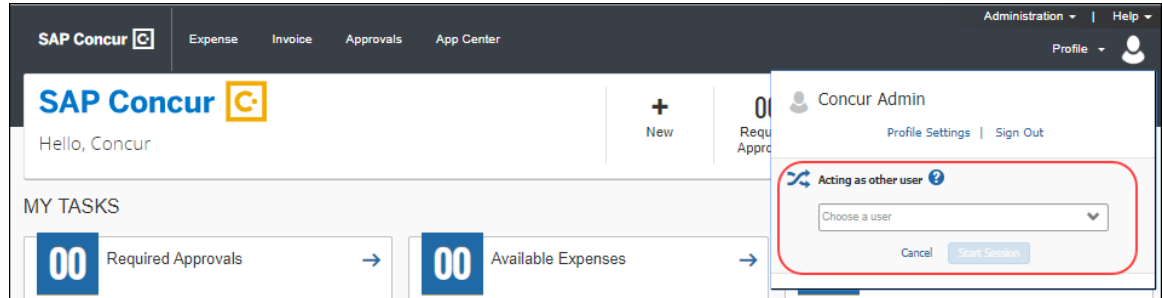


- The employee must exist as a user in the **Users** page of Product Settings.

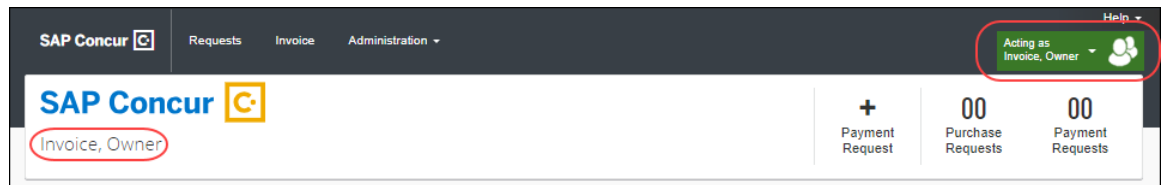


What the Proxy Sees

In the Profile window, a Proxy sees all of the employees in the **Administer for another user** list. A Proxy will see other users who have the *Can Administer* role in Expense or the *Is Invoice Admin* role in Invoice but will not see themselves.



The **Profile** menu option becomes **Acting as <name>** and the single user icon becomes a double user icon.

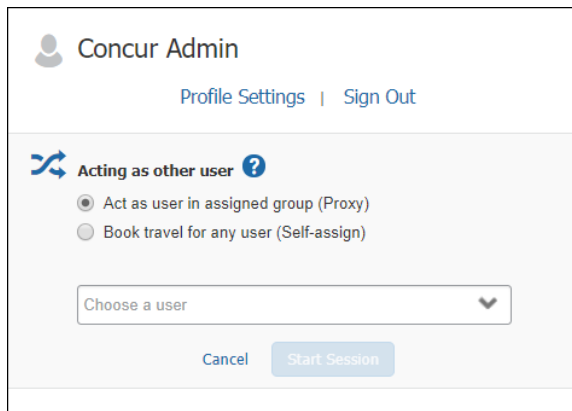


Section 4: Use Proxy Logon

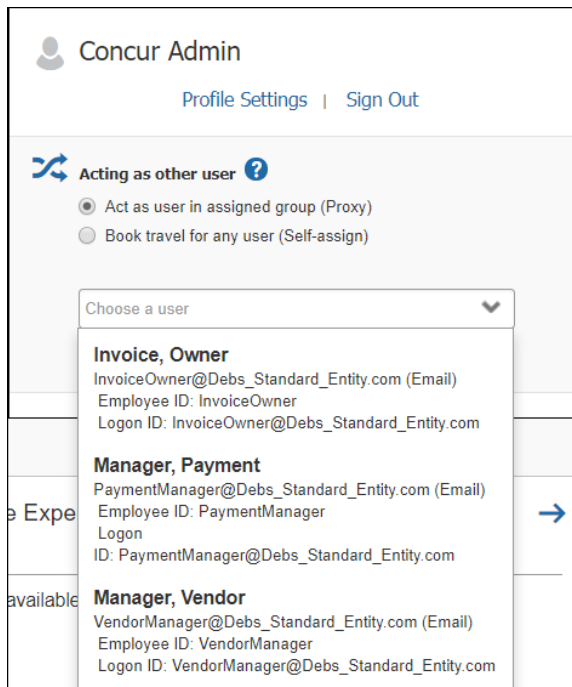
Accessing the Expense Proxy Logon Tool

▶ **To access the Expense Proxy Logon tool:**

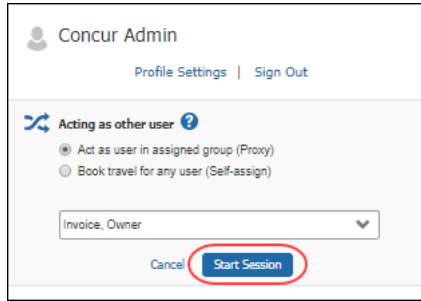
1. Click **Profile**.
2. Select **Act as user in assigned group (Proxy)**. The radio buttons that appear depend on the user roles assigned to the user. If the user only has the Proxy User role and does not have the Delegate or Travel Arranger roles, the radio buttons will not appear.



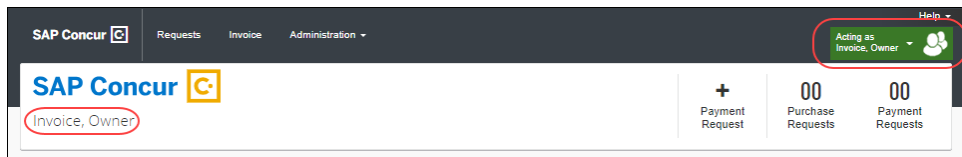
3. Enter or select the name of the desired user.



4. Click **Start Session**.

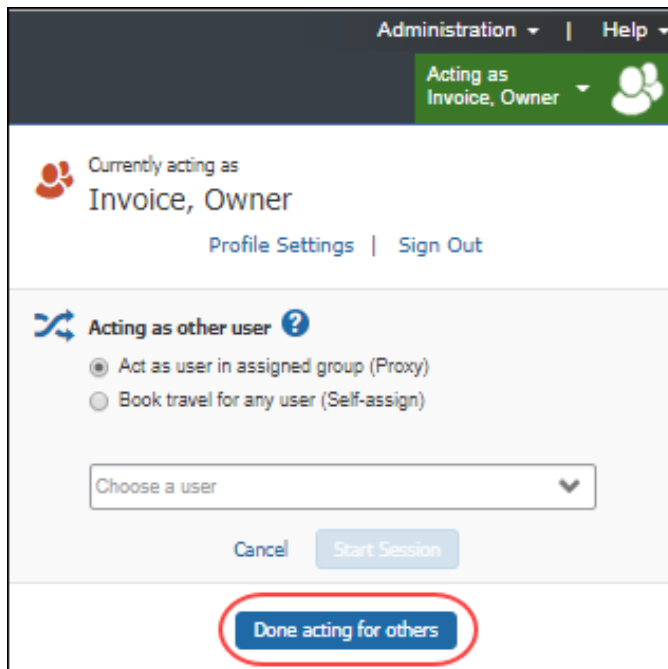


The **Profile** menu turns green, then becomes **Acting as <name>** and the single "user" icon becomes a double "user" icon.



Exiting Expense Proxy Logon

To stop acting as a proxy for another user, the proxy user clicks **Acting as <name>** and then clicks **Done acting for others**.



Manage Expense Reports or Invoices

As a Proxy, you can create, submit, view, edit, delete, or print expense reports or invoices for another employee within the company. This process behaves the same as when you manage your own personal expense reports.

NOTE:A Proxy cannot approve reports and invoices.



For more information on how to manage an expense report or a invoice, refer to the Expense or Invoice online Help.

Modifying Profile for an Employee

This process behaves the same as when you modify your own Profile.

NOTE:A Proxy cannot change a password.



For more information on how to modify the information in Profile, refer to the Expense or Invoice online Help.

Section 5: Auditing Proxy Actions

While a Proxy is acting on behalf of another employee, SAP Concur tracks the actions that the Proxy performs. Expense and Invoice permanently records the following actions in the report or request audit trail:

- The name of the person who last modified an expense, expense report, or invoice
- The name of the person who submitted the expense report or invoice, in addition to the time it was submitted