

Shared: Proxy Logon

User Guide for Concur Standard Edition

Last Revised: April 5, 2023

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

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Revision History

Date	Notes/Comments/Changes
April 5, 2023	Updated to reflect "Act As" profile menu changes (March release).
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.

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

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**

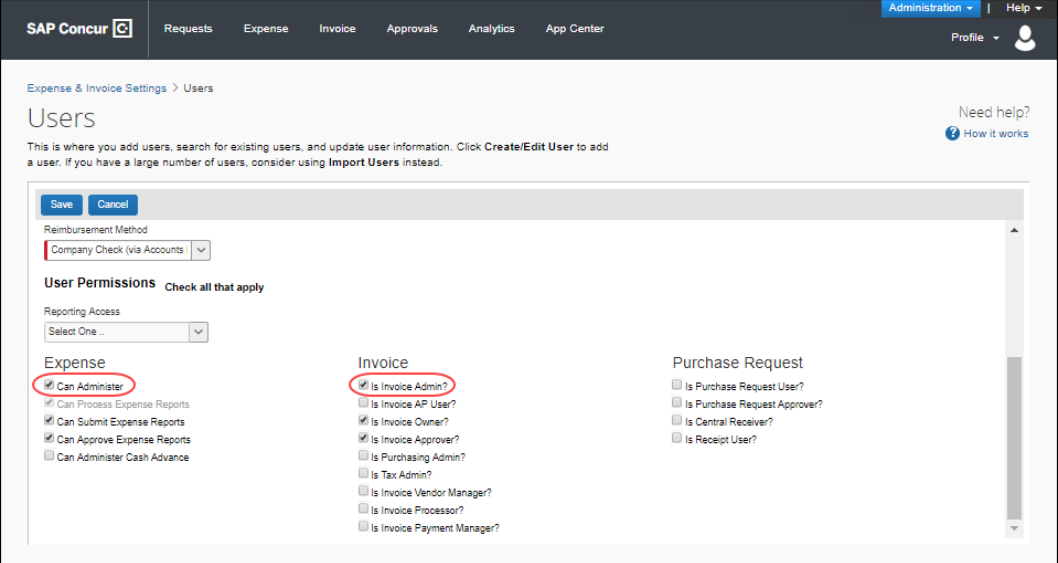
As a Proxy, you are restricted to the features and tasks that the employee for whom you are acting can perform.

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:

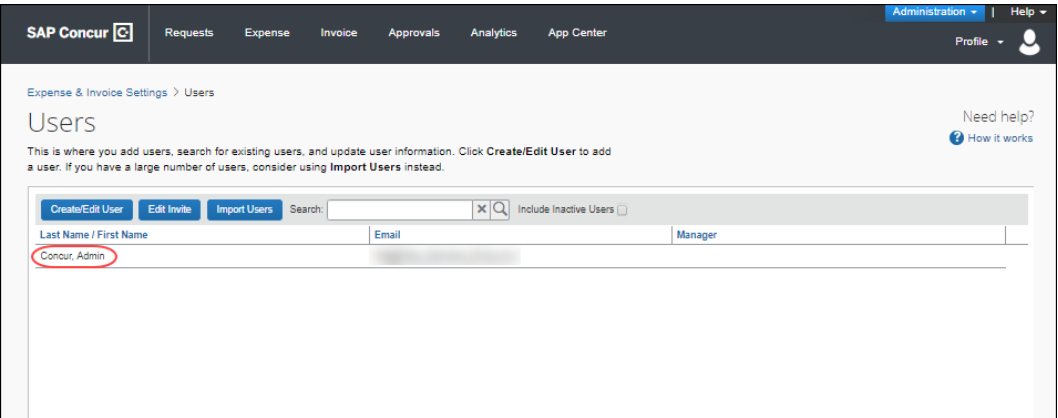
- The proxy must be assigned the *Can Administer* role in Expense or the *Is Invoice Admin* role in Invoice in the **Users** page of Product Settings.



The screenshot shows the 'Users' page in SAP Concur. The 'Expense' section has the 'Can Administer' checkbox checked. The 'Invoice' section has the 'Is Invoice Admin?' checkbox checked. The 'Purchase Request' section has no checkboxes checked.

Expense	Invoice	Purchase Request
<input checked="" type="checkbox"/> Can Administer	<input checked="" type="checkbox"/> Is Invoice Admin?	<input type="checkbox"/> Is Purchase Request User?
<input checked="" type="checkbox"/> Can Process Expense Reports	<input type="checkbox"/> Is Invoice AP User?	<input type="checkbox"/> Is Purchase Request Approver?
<input checked="" type="checkbox"/> Can Submit Expense Reports	<input checked="" type="checkbox"/> Is Invoice Owner?	<input type="checkbox"/> Is Central Receiver?
<input checked="" type="checkbox"/> Can Approve Expense Reports	<input type="checkbox"/> Is Invoice Approver?	<input type="checkbox"/> Is Receipt User?
<input type="checkbox"/> Can Administer Cash Advance	<input type="checkbox"/> Is Purchasing Admin?	
	<input type="checkbox"/> Is Tax Admin?	
	<input type="checkbox"/> Is Invoice Vendor Manager?	
	<input type="checkbox"/> Is Invoice Processor?	
	<input type="checkbox"/> Is Invoice Payment Manager?	

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

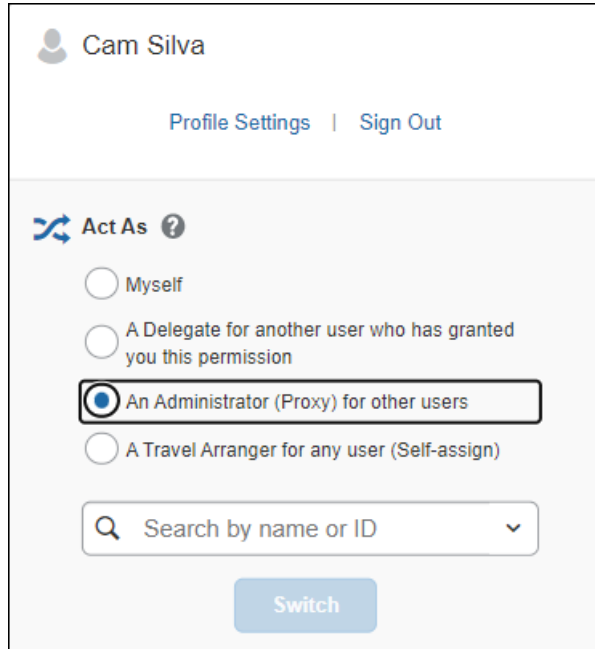


The screenshot shows the 'Users' page in SAP Concur. The 'Create/Edit User' button is highlighted. Below the buttons, there is a table with columns for 'Last Name / First Name', 'Email', and 'Manager'. The first row shows 'Concur, Admin' in the 'Last Name / First Name' column.

Last Name / First Name	Email	Manager
Concur, Admin		

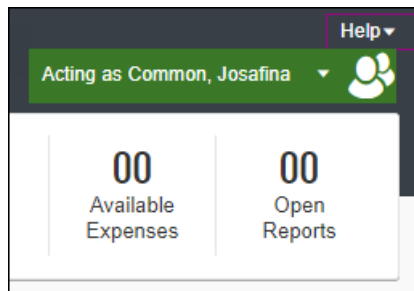
What the Proxy Sees

In the **Profile** menu, when they select the **An Administrator (Proxy) for other users** option, a Proxy can search for and choose to act on behalf of designated employees.



The screenshot shows a user profile for 'Cam Silva' with links for 'Profile Settings' and 'Sign Out'. Below this is the 'Act As' section, which includes a question mark icon and four radio button options: 'Myself', 'A Delegate for another user who has granted you this permission', 'An Administrator (Proxy) for other users' (which is selected and highlighted with a red box), and 'A Travel Arranger for any user (Self-assign)'. Below the options is a search bar with the placeholder text 'Search by name or ID' and a dropdown arrow. At the bottom of the section is a blue 'Switch' button.

After they switch to acting as a proxy for another user, the **Profile** menu header becomes **Acting as <name>** and the single user icon becomes a double user icon.



The screenshot shows the top of the application interface. The header bar is dark green and contains a 'Help' dropdown, a status indicator 'Acting as Common, Josafina' with a dropdown arrow, and a double-user icon. Below the header are two white dashboard cards: 'Available Expenses' and 'Open Reports', each displaying '00' in large text.

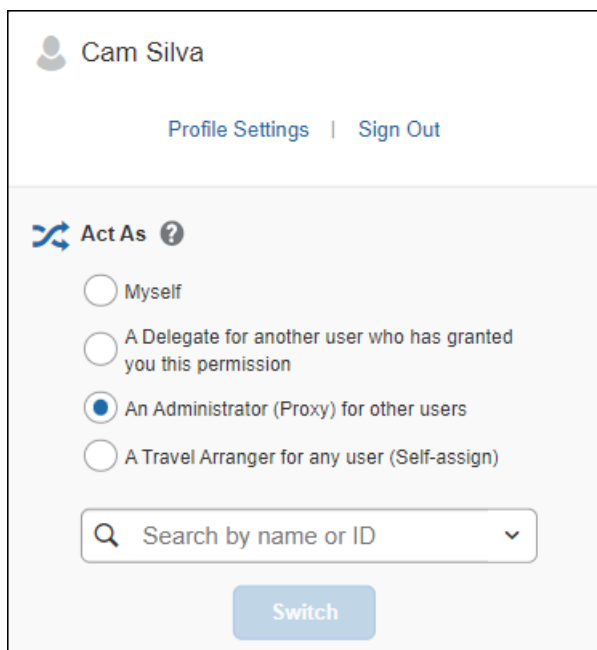
Section 4: Use Proxy Logon

Accessing the Expense Proxy Logon Tool

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

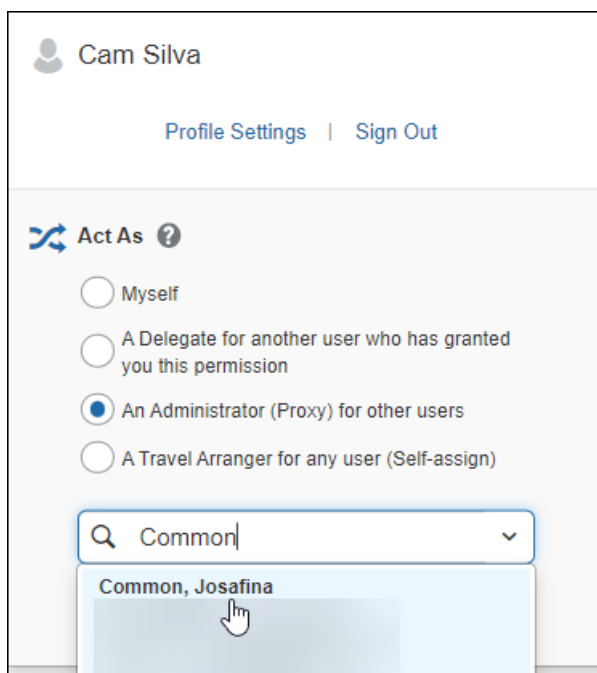
1. Click **Profile**.
2. Select **An Administrator (Proxy) for other users**.

NOTE: The radio buttons that appear in the **Act As** menu depend on the roles assigned to the user. For example, if the user is not a travel arranger, that option does not appear in the **Act As** menu.

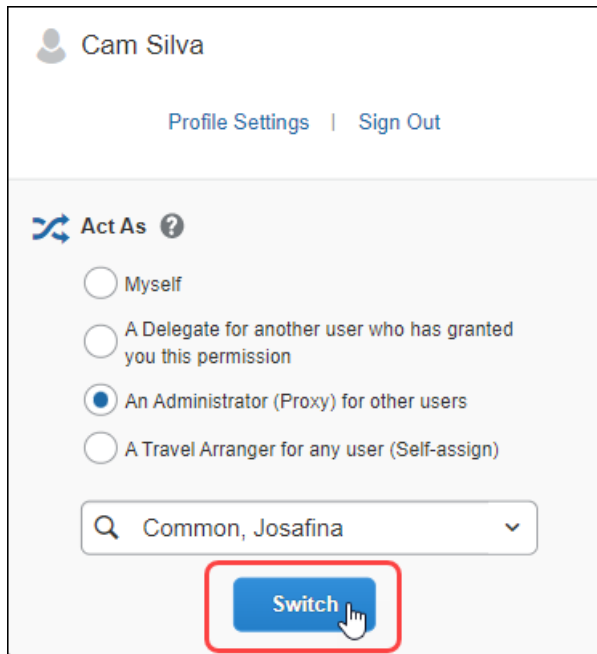


The screenshot shows the user interface for the 'Act As' menu. At the top, the user's name 'Cam Silva' is displayed next to a profile icon. Below this are links for 'Profile Settings' and 'Sign Out'. The 'Act As' section is highlighted, featuring a blue icon and a help icon. It contains four radio button options: 'Myself', 'A Delegate for another user who has granted you this permission', 'An Administrator (Proxy) for other users' (which is selected), and 'A Travel Arranger for any user (Self-assign)'. Below the radio buttons is a search input field with a magnifying glass icon and the placeholder text 'Search by name or ID'. A 'Switch' button is located at the bottom of the section.

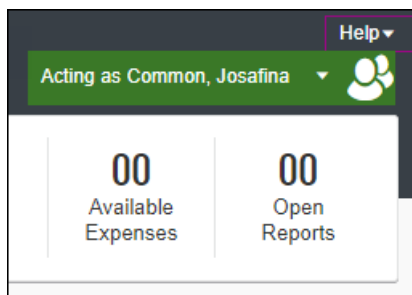
3. Enter the name of the desired user or select a name from the **Most Recent Users** list.



This screenshot shows the same 'Act As' menu as the previous one, but with the search dropdown open. The search input field now contains the text 'Common'. Below the input field, a dropdown list is visible, showing the search results. The first result, 'Common, Josafina', is highlighted, and a mouse cursor is pointing at it.

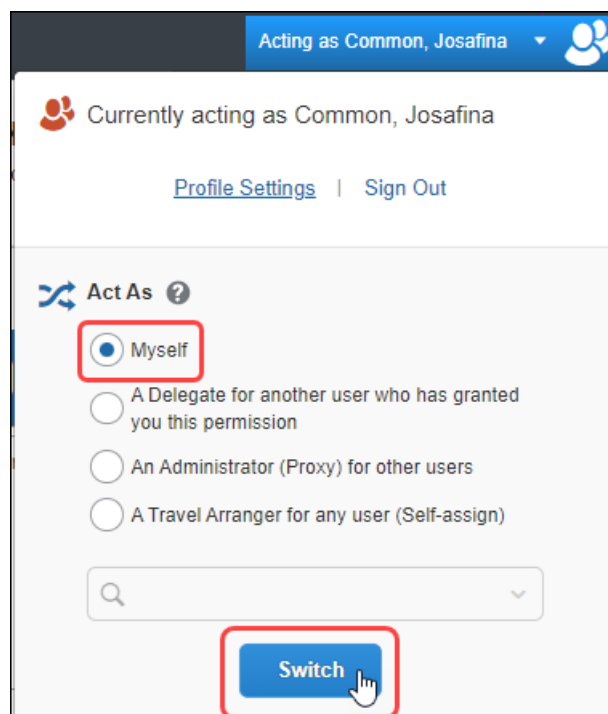
4. Click **Switch**.

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



Exiting Expense Proxy Logon

To return to working for themselves, the user clicks **Myself** and then clicks **Switch**.



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 an 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

