

# Concur Expense: Proxy Logon

## User Guide

**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



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# Revision History

| Date              | Notes / Comments / Changes   |
|-------------------|--|
| January 21, 2022  | Updated the copyright year; no other changes; cover date not updated   |
| January 8, 2021   | Updated the copyright; added Concur to the cover page title; cover date not updated  |
| April 13, 2020    | Renamed the Authorization Request check box to Request on the guide's title page.  |
| January 2, 2020   | Updated the copyright; no other changes; cover date not updated  |
| December 17, 2019 | Removed information about the "pause" feature when acting on behalf of another employee  |
| January 7, 2019   | Updated the copyright; no other changes; cover date not updated  |
| April 5, 2018     | Changed the check boxes on the front cover; no other changes; cover date not updated   |
| March 7 2018      | Updated the copyright; no other changes; cover date not updated  |
| December 14 2016  | Changed copyright and cover; no other content changes.   |
| May 13 2016       | Updated instances of he/she to they.   |
| October 16 2015   | Updated information about the Profile menu and proxy ability to access the Administration menu.  |
| February 17 2015  | Removed references to the current UI; no other content changes   |
| February 6 2015   | Added that an Expense Proxy cannot view details of personal cards and personal card charges  |
| January 16 2015   | Updated the screen shots to the enhanced UI; no other content changes  |
| October 14 2014   | Added information about the two user interfaces; no other content changes  |
| December 28 2012  | Made rebranding and/or copyright changes; no content changes   |
| February 2012     | Changed copyright; no content change   |
| February 25 2011  | The Proxy link is removed from the <i>Classic</i> user interface - all actions are now taken within the <i>Current</i> user interface<br>A change to how the user accesses Proxy is now documented |
| December 31 2010  | Updated the copyright and made rebranding changes; no content changes  |
| December 11 2009  | Changed to stand-alone user guide; no content change   |
| June 19 2009      | <b>Active Reports</b> (on My Concur) changed to <b>Active Work</b>   |
| September 25 2008 | Changed the format slightly. Since there are no changes to content, the revision date has not changed.   |
| Jul. 2008 (SU 33) | Added information about the two available user interfaces: <ul style="list-style-type: none"> <li>◆ <i>Classic</i> user interface</li> <li>◆ <i>Current</i> user interface</li> </ul>              |

# Proxy Logon

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## Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by Concur. In this case, the client must initiate a service request with SAP Concur support.

## Section 2: Overview

The Expense Proxy Logon tool allows an employee, assigned the role of Expense Proxy Logon, to act as a proxy (stand-in) for another employee, to perform tasks for either centralized data entry or Helpdesk support. Using the Expense Proxy Logon tool, the proxy may sign on to the system as any employee that is assigned the role of Expense User. The proxy and the employee(s) must belong to the same hierarchical group(s) in order for the proxy to perform expense-related tasks on behalf of the employee(s).

### What is an Expense Proxy?

An Expense Proxy may perform these tasks:

- Create an expense report and cash advance request
- View, edit, and delete expense reports
- Submit an expense report and cash advance request
- Print an expense report
- Modify an employee's information within Profile

The role is restricted to the features and tasks that the employee for whom the proxy is acting, can perform.

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**NOTE:** An Expense Proxy cannot approve reports and payment requests, change passwords, or view details of personal cards and personal card charges.

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## Before You Begin

Before the proxy can work on behalf of another employee, the following steps must occur:

- Employees must be entered into the system, either through the Employee Import process, or manually by using User Administration.



The import process is not mandatory, as the Employee administrator can manually enter employee data into the system; however, depending on company size, this process could be time consuming. For information about the employee import process, contact your Expense administrator. For information about User Administration, refer to the *Shared: User Administration User Guide* or contact your Expense administrator.

- The Global and Group Shared Configuration administrators must configure the employee groups, within the Group Configurations area of the Shared Configuration Administrator.
- The Global and Group Expense Configuration administrators must configure the expense-related and cash advance related groups, within the Group Configurations area of the Expense Configuration Administrator.



Adding groups to the system can be done manually, or as part of the employee load process. For more information on manual group configuration, refer to the *Shared: Feature Hierarchies and Group Configurations Setup Guide*, or contact your Expense administrator. For more information on the employee import process, refer to the *Shared: User Administration User Guide*, or contact your Expense administrator.

- The Employee administrator must assign the Expense Proxy Logon role to the employee and select the hierarchical group(s) for which the employee can act.



For more information on assigning roles to an employee using User Permissions, refer to the *Shared: User Administration User Guide*.

## What the Employee Administrator Sees

The Expense Proxy Logon role must be granted to an employee before the Expense Proxy Logon tool can be accessed. The Employee administrator uses **User Permissions** to grant this assignment.



For more information on how to add, edit, or delete user roles by using User Permissions, refer to the *Shared: User Administration User Guide* or contact your Expense administrator.

## Section 3: Proxy Logon Tool

Multiple employees may be assigned the Expense Proxy Logon role, with each employee assigned to all employees within a group or several groups. The only limit on who an Expense Proxy can act for is the hierarchical group that the proxy is configured to support.

### 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.

Terry L Brown  
Profile Settings | Sign Out

**Acting as other user** ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)
- Book travel for any user (Self-assign)

Search by name or ID

Cancel Start Session

3. Enter the name of the desired user or select it from the list.

Terry L Brown  
Profile Settings | Sign Out

**Acting as other user** ?

- Act on behalf of another user
- Act as user in assigned group (Proxy)
- Book travel for any user (Self-assign)

Davis, Pat R

**Brown, Donn R**  
db@commasavvy.com (Email)  
Employee ID: db1234  
Logon ID: db@commasavvy.com  
Org Unit 1-Division: Sales

**Davis, Pat R**  
patdavis@commasavvy.com (Email)  
Employee ID: PatDavis  
Logon ID: PatDavis@CommaSavvy.com  
Org Unit 1-Division:

4. Click **Start Session**.

Terry L Brown

Profile Settings | Sign Out

**Acting as other user** ?

Act on behalf of another user

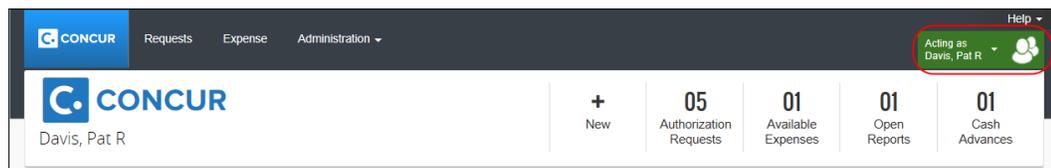
Act as user in assigned group (Proxy)

Book travel for any user (Self-assign)

Davis, Pat R

Cancel **Start Session**

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



## Creating and Submitting Expense Reports or Cash Advance Requests

As an Expense Proxy, you have the ability to create and submit expense reports and cash advance requests for another employee within the company. This is useful in locating problems or working in a centralized data entry situation. Once you access the employee's account, you will be able to perform the following actions:

- Create expense reports or cash advance requests
- View, edit, and delete expense reports
- Submit expense reports or cash advance requests
- Print expense reports
- Modify an employee's information from the Profile area

### ***Creating an Expense Report or Cash Advance Request***

This process behaves the same as when you create a personal expense report or cash advance request. The information appears in the following areas, for the employee you are acting on behalf of:

- The created expense reports appear for the employee you are acting on behalf of on the **View Reports** page.



For more information about creating an expense report, refer to the **Expense Reports** section of Expense online help.

- The created cash advance requests appear for the employee you are acting on behalf of, on the **Cash Advance List** page.



For more information about creating a cash advance request, refer to the **Cash Advances** section of Expense online help.

### ***Viewing, Editing, and Deleting Expense Reports or Cash Advance Requests***

This process is the same as viewing, editing, and deleting personal expense reports or cash advance requests. You will only be able to delete expense reports or cash advance requests that have not yet been submitted.



For more information about viewing, editing, or deleting expense reports, refer to the **Expense Reports** section of Expense online help. For more information about viewing, editing, or deleting cash advance requests, refer to the **Cash Advances** section of Expense online help.

### ***Submitting or Resubmitting Expense Reports or Cash Advance Requests***

This process behaves the same as when you submit or resubmit a personal expense report or cash advance request. The information appears in the following areas, for the employee you are acting on behalf of:

- The submitted or resubmitted expense reports appear for the employee you are acting on behalf of, on the **View Reports** page.



For more information about submitting or resubmitting an expense report, refer to the **Expense Reports** section of Expense online help.

- The submitted or resubmitted cash advance requests appear for the employee you are acting on behalf of, on the **Cash Advance List** page.



For more information about creating a cash advance request, refer to the **Cash Advances** section of Expense online help.

### Printing an Expense Report

This process behaves the same as when you print a personal expense report. You have the option to print a Detailed Report or Receipt Report for any of the expense reports listed within the employee's **View Reports** page.

 For more information on how to print an expense report, refer to the **Expense Reports** section of Expense online help.

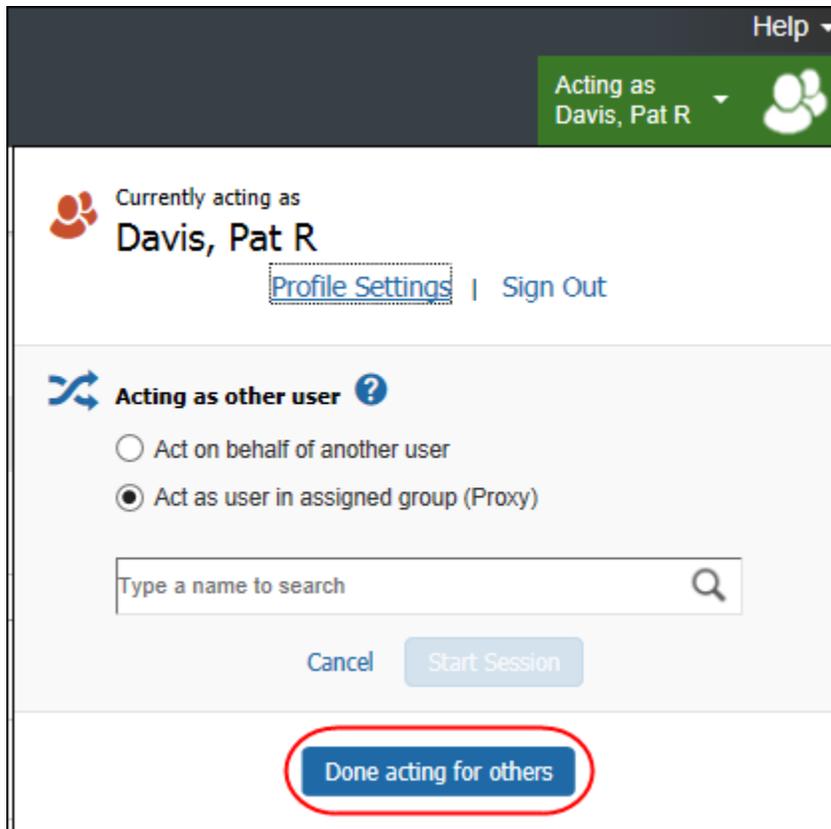
### Modifying Profile for an Employee

This process behaves the same as when you modify your own Profile. The only differences are that you will be unable to change the password on behalf of the employee, and certain fields may be read-only depending on how the Shared Configuration administrator configured the fields for the Employee form you are viewing.

 For more information on how to modify the information in Profile, refer to the **Profile** section of Expense online help.

### Exiting Expense Proxy Logon

To return to working for themselves, the user clicks **Acting as <name>** and then clicks **Done acting for others**.



The screenshot shows the Expense Proxy Logon interface. At the top right, there is a 'Help' dropdown and a green bar indicating 'Acting as Davis, Pat R' with a user icon. Below this, the current user is identified as 'Davis, Pat R' with a 'Profile Settings' link and a 'Sign Out' button. The 'Acting as other user' section is active, showing two radio button options: 'Act on behalf of another user' (unselected) and 'Act as user in assigned group (Proxy)' (selected). Below these options is a search box labeled 'Type a name to search' with a magnifying glass icon. At the bottom of the section are 'Cancel' and 'Start Session' buttons. A red oval highlights the 'Done acting for others' button at the very bottom of the interface.

## **Auditing Proxy Actions**

While an Expense Proxy is acting on behalf of another employee, Expense provides a data trail of the actions being performed. The following actions are permanently recorded:

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