

# Concur Invoice: Proxy Logon

## User Guide

**Last Revised: December 17, 2019**

Applies to these SAP Concur solutions:

- Concur Expense
  - Professional/Premium edition
  - Standard edition
- Concur Travel
  - Professional/Premium edition
  - Standard edition
- Concur Invoice
  - Professional/Premium edition
  - Standard edition
- Concur Request
  - Professional/Premium edition
  - Standard edition



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# Revision History

Date	Notes/Comments/Changes
October 1, 2022	Minor edits; cover not updated.
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
March 4, 2021	Updated the copyright year; no other changes; cover date not updated
April 20, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated
January 7, 2020	Updated the copyright; no other changes; cover date not updated
December 17, 2019	The ability to pause when "Acting as..." another user has been removed. Removed references to this feature from the doc.
April 13, 2019	Changed the term "payment request" to "invoice" as part of the new user experience for Concur Invoice including images.
March 14, 2019	Changed the term "Concur" to "SAP Concur" and the term "payment request" to "invoice where applicable; no other content changes.
February 1, 2019	Updated the copyright; no other changes; cover date not updated
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated
January 25 2018	Updated the copyright; no other changes; cover date not updated
December 13 2016	Changed copyright and cover; no other content changes.
December 5 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.
October 16 2015	Updated information about the Profile menu and proxy ability to access the Administration menu.
March 13 2015	Updated the images to the enhanced UI and made general updates to the content.
November 30 2014	Integration Administrator has changed to Import/Extract Administrator; no other content changes
September 17 2014	Added information about the two user interfaces; no other content changes
April 15 2014	Change copyright and cover; no other content changes
December 28 2012	Made rebranding and/or copyright changes; no content changes
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
December 31 2010	Updated the copyright and made rebranding changes; no content changes
December 2009	Changed to stand-alone user guide; no content change
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.

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

## Section 2: Overview

The Invoice Proxy Logon allows an employee assigned the role of Invoice 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 Invoice Proxy Logon, the proxy may sign on to the system as any employee that is assigned the role of Invoice User. The proxy and the employee(s) must belong to the same hierarchical group(s) in order for the proxy to perform payment-related tasks on behalf of the employee(s).

### What is an Invoice Proxy?

An Invoice Proxy may perform these tasks:

- Create, view, edit, and delete invoices
- Submit and print invoices
- Modify an employee's information within **Profile Settings**

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:** The Invoice Proxy cannot approve invoices regardless of permissions or role assignment.

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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 SAP Concur Administrator. For information about the Employee Administrator tool, refer to the *Shared: User Administration User Guide*, or contact your Concur Invoice 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 Invoice Configuration administrators must configure the payment-related groups, within the Group Configurations area of the Invoice Configuration administrator.



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

- The Employee administrator must assign the Invoice 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*, or contact your Concur Invoice administrator.

The Invoice Proxy Logon role must be granted to an employee before the Invoice Proxy Logon 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 Concur Invoice administrator.

## Employee Administrator Experience

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

Company Admin Home

Travel Expense Request Invoice Reporting Supplier Portal

Save Cancel

Step1. Modify Roles By: User Name [dropdown]

Step2. Search Text: Search What: Name, Email, Log-in [dropdown] Search

Step3. User Name to Assign Roles: Fletcher, Erin [dropdown]

Show Users in Only This Employee Group Configuration: All Users I Can Access [dropdown]

Available Roles	Actions	Roles for this User	Gr
Invoice Processor Manager		Invoice Purchasing User	
<b>Invoice Proxy Logon</b>	Add >> Modify > << Remove	Invoice Receipt Processor	Gk
Password Manager		Invoice Tax Administrator	
Purchase Request Proxy Logon		Invoice User	
Role Administrator		Invoice Vendor Manager	Gk
Role Builder		Purchase Order Processor	Gk

User Administration

- User Administration
- Add User
- Self-Registration Setup
- Self-Registration Approval
- Send Mobile Instructions
- User Permissions**
- Company Groups



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 Concur Invoice administrator.

## Section 3: Accessing Invoice Proxy Logon

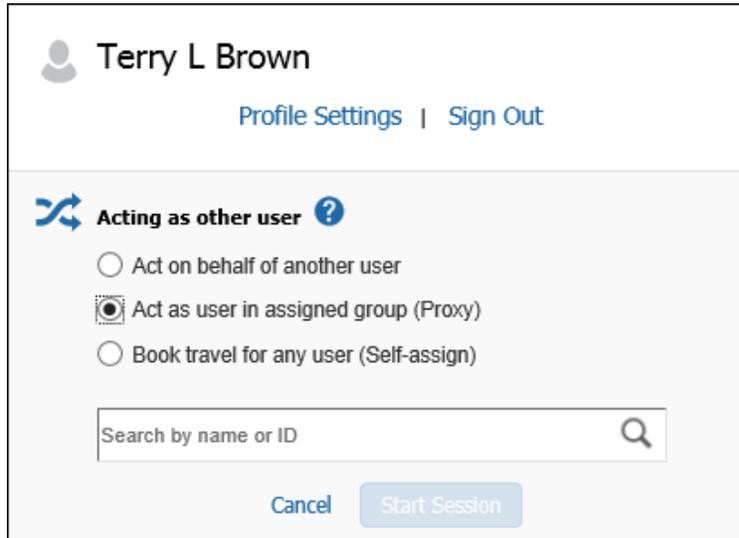
Multiple employees may be assigned the Invoice Proxy Logon role, with each employee typically assigned to all employees within a group or several groups.

The Invoice Proxy can support all employees within the hierarchical groups they are configured for.

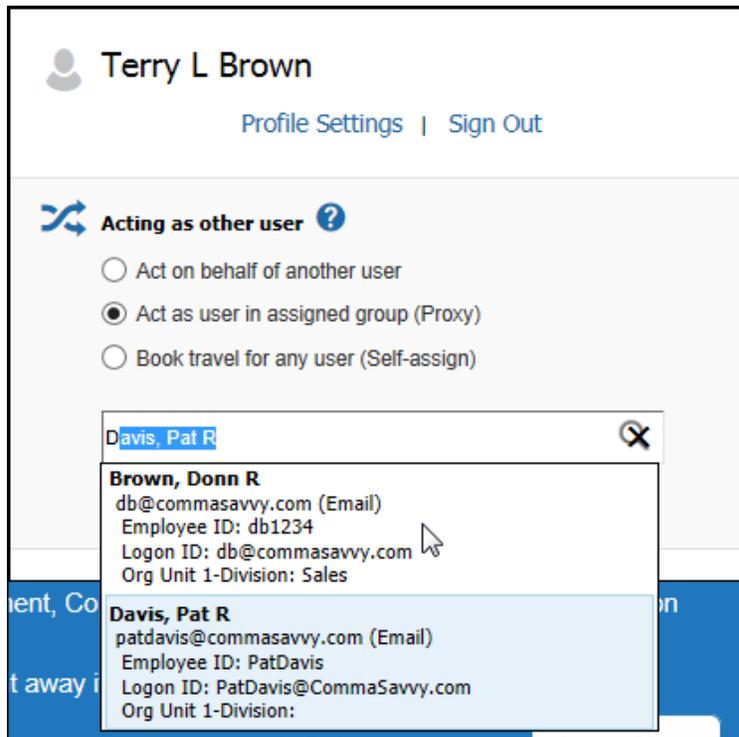
The Invoice Proxy Logon is accessed from the **Profile** menu.

▶ **To access the Invoice Proxy Logon:**

1. Click **Profile**.
2. Select **Act as user in assigned group (Proxy)**. The options that appear depend on the 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 options will not appear.



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



4. Click **Start Session**.

Terry L Brown  
Profile Settings | Sign Out

**Acting as other user** ?

Act on behalf of another user

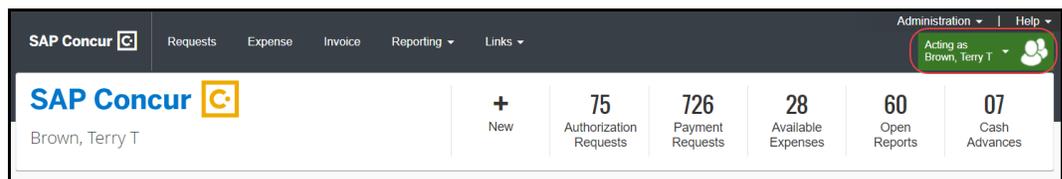
Act as user in assigned group (Proxy)

Book travel for any user (Self-assign)

Davis, Pat R

Cancel **Start Session**

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



## Section 4: Creating and Submitting Invoices

As an Invoice Proxy, you can create and submit invoices for another employee within the company. This is useful when attempting to locate problems, or when performing tasks such as centralized data entry. After accessing the employee's account, you will be able to perform the following actions:

- Create, view, edit, and delete invoices
- Submit and print invoices
- Modify an employee's information in the **Profile Settings**

### Create an Invoice

This process behaves the same as when you create a personal invoice. The created invoices appear for the employee you are acting on behalf of on the **Invoice List** page.



For more information about creating an invoice, refer to the *Create a New Invoice* topic within the Concur Invoice Online Help.

## View, Edit, and Delete Invoices

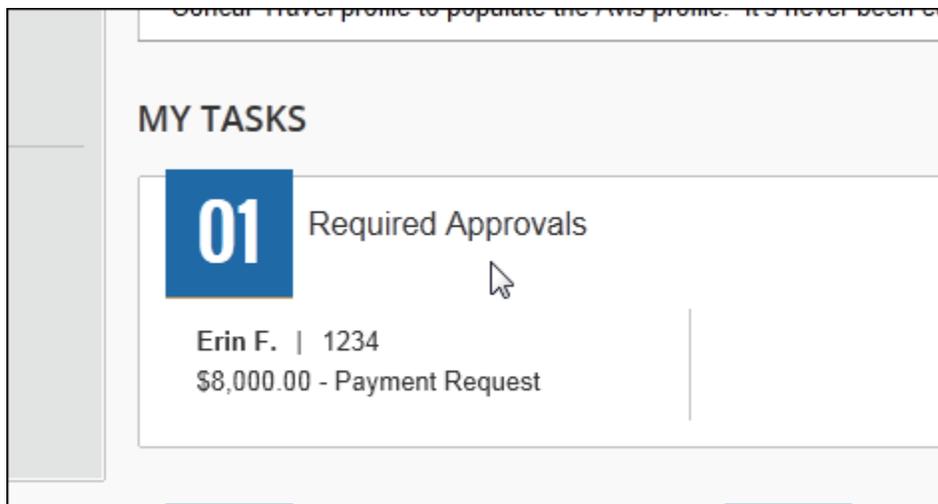
This process is the same as viewing, editing, and deleting personal invoices. You can only delete invoices that have not been submitted.



For more information about viewing, editing, or deleting invoices, refer to the *View, Edit, or Delete Invoices* topic within the Concur Invoice Online Help.

## Submit and Resubmit Invoices

This process behaves the same as when you submit or resubmit a personal invoice. The submitted or resubmitted invoices appear for the employee you are acting on behalf of, in the **My Tasks** area on the home page and if you click **Invoice > My Invoices**.



For more information about submitting or resubmitting an invoice, refer to the *Print and Submit Invoices* topic within the Concur Invoice Online Help.

## Print an Invoice

This process behaves the same as when you print a personal invoice. You have the option to print an invoice or an invoice preview for any of the invoices listed within the employee's **Invoice List** page.



For more information on how to print an invoice, refer to the *Print and Submit Invoices* topic within the Concur Invoice Online Help.

## Modify Profile Settings for an Employee

This process behaves the same as when you modify your own **My Profile** area. The only differences are that you cannot 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.



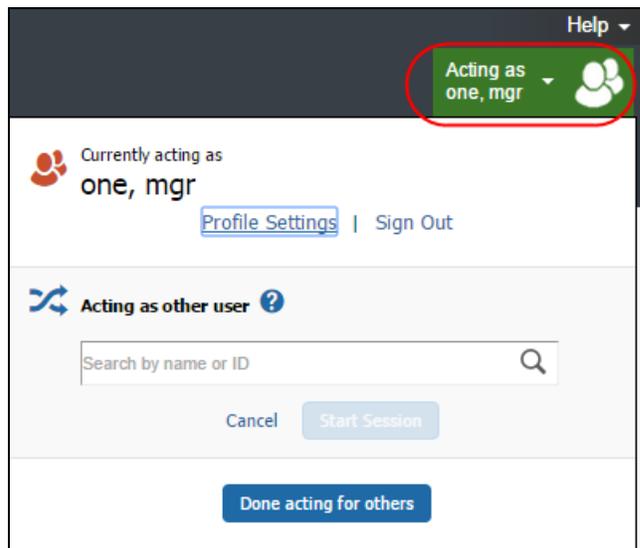
For instructions on how to modify the information in **Profile Settings**, refer to the *Personalize Your Information* topic in the Concur Invoice Online Help.

## Section 5: Changing the Employee for Invoice Proxy Logon

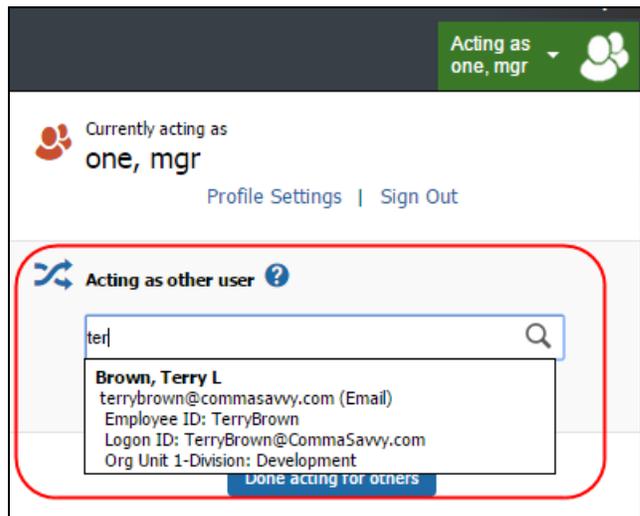
An Invoice Proxy may need to act on behalf of more than one employee.

▶ **To change the employee for proxy:**

1. Click the **Acting as <name>**. The **Acting as other user** search field displays.



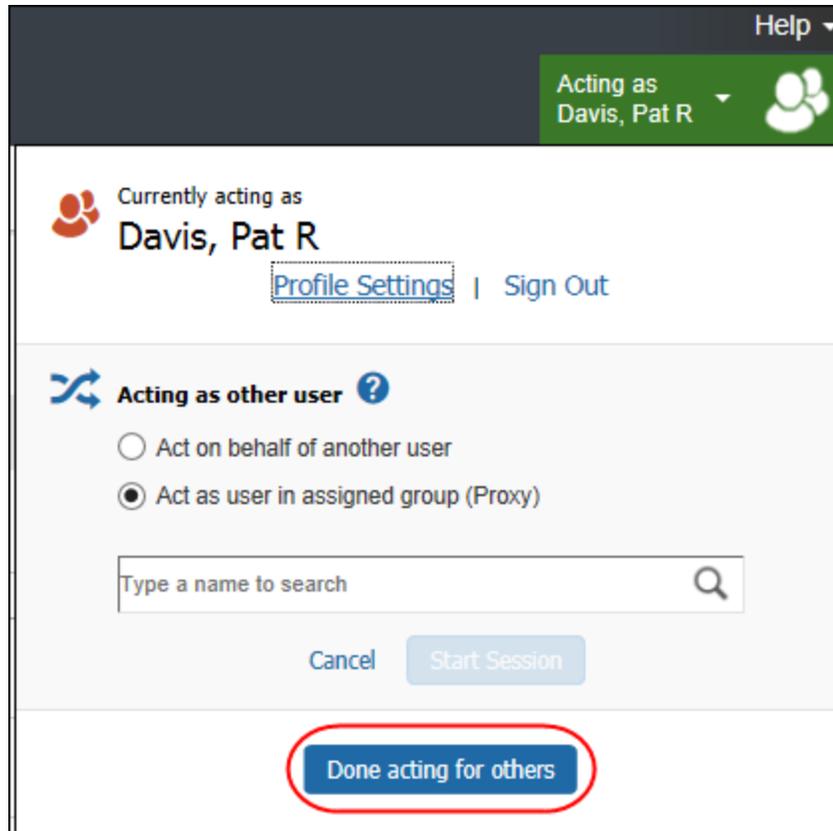
2. Type in the name or email address of the employee on whose behalf you want to act. A list will automatically populate with matching names:



3. Click **Start Session** to act as the selected user.

## Section 6: Stop Acting as a Proxy for Another User

To return to working on their own behalf, the proxy user clicks **Acting as <name>** and then clicks **Done acting for others**.



## Section 7: Auditing Proxy Actions

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

- The name of the person who last modified the invoice or line item detail
- The name of the person who submitted the invoice, in addition to the time it was submitted.