Invoice: 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

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<tr>
<td>April 20, 2020</td>
<td>Renamed the Authorization Request check box to Request on the guide’s title page; cover date not updated</td>
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<td>Updated the copyright; no other changes; cover date not updated</td>
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Proxy Logon

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. 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.

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

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 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 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 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 Invoice administrator.
What the Employee Administrator Sees

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.

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 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.
Section 4: Creating and Submitting Invoices

4. Click **Start Session**.

![Profile Settings](image)

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

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**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 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 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 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 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.
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:

![Image of acting as another user]

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**.

![Image of Acting as Proxy screen]

Section 7: Auditing Proxy Actions

While an Invoice Proxy is acting on behalf of another employee, 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.