TeamWorks

Travel and Expense

Powered By Concur Technologies

TTE Local Admin:

Expense Proxy Logon
Handbook 2017

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Document History

Date	Notes/Comments/Changes
01/23/12	SAO-TTE Training issued document.
11/06/13	SAO-TTE Training updated document for branding only. No other changes
12/31/14	Updated for two user interfaces, no other changes
07/27/15	Removed two user interfaces.
09/22/15	Minor formatting adjustments
05/17/17	Updated screen shots for newer interface and minor access change.

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 TTE Global Administrator at SAO.

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 agency must contact the TTE Global Administrator at SAO.

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.

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

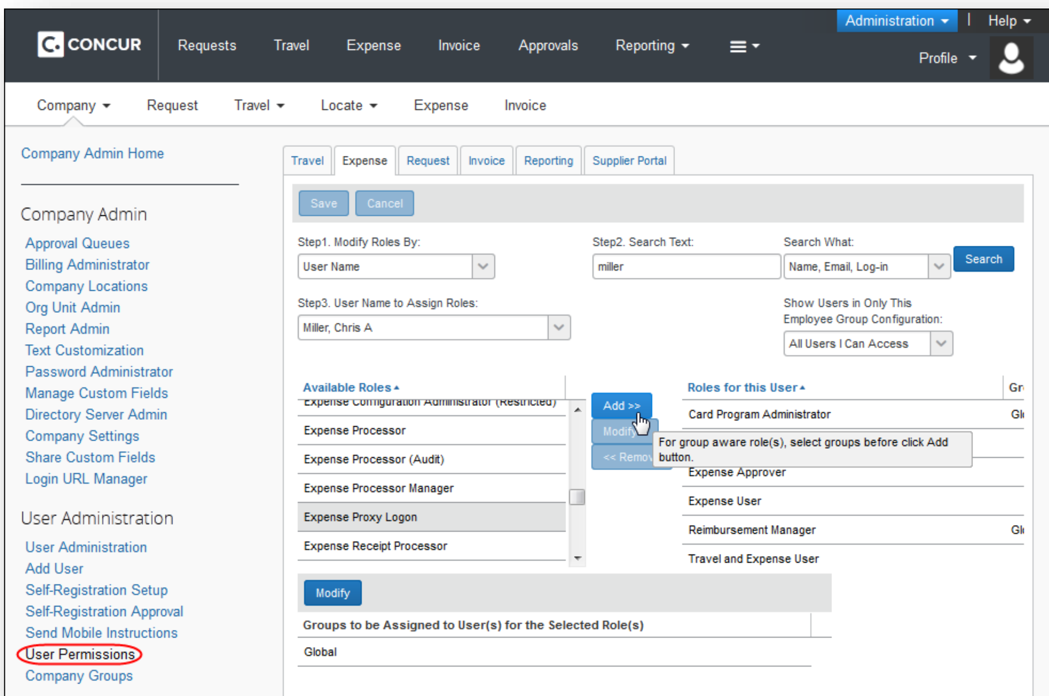
Before You Begin

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

- Employees must be entered into the system by the Employee Import process.
- The TTE Global Administrators must configure the expense-related and cash advance related groups, within the GroupConfigurations area of the Expense Configuration 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.

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.



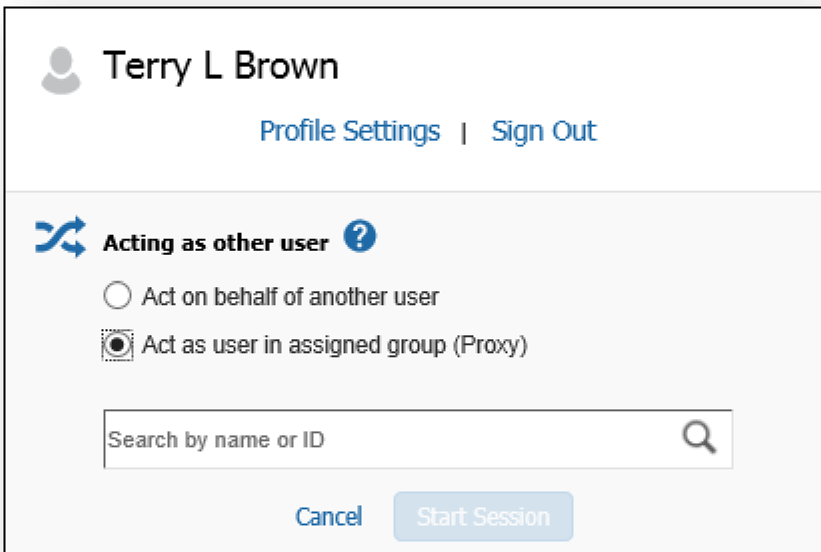
Section 3: Proxy Logon Tool

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.

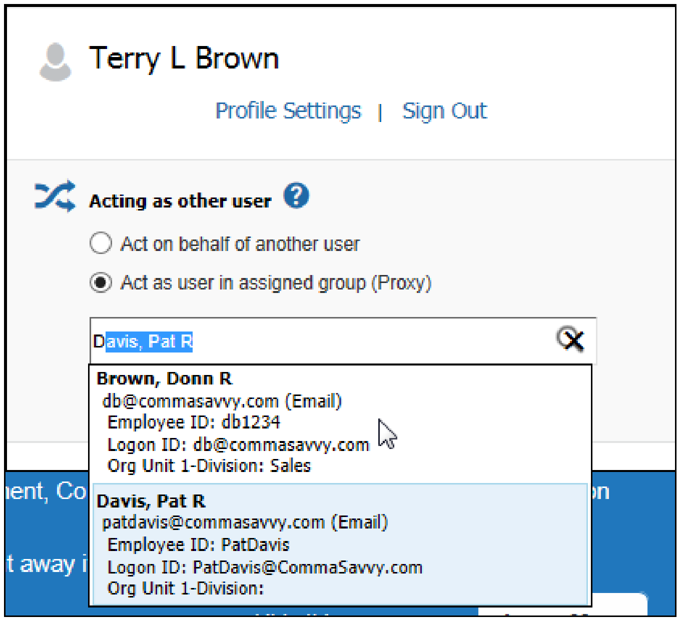
Accessing the Expense Proxy Logon Tool

To access the Expense Proxy Logon tool:

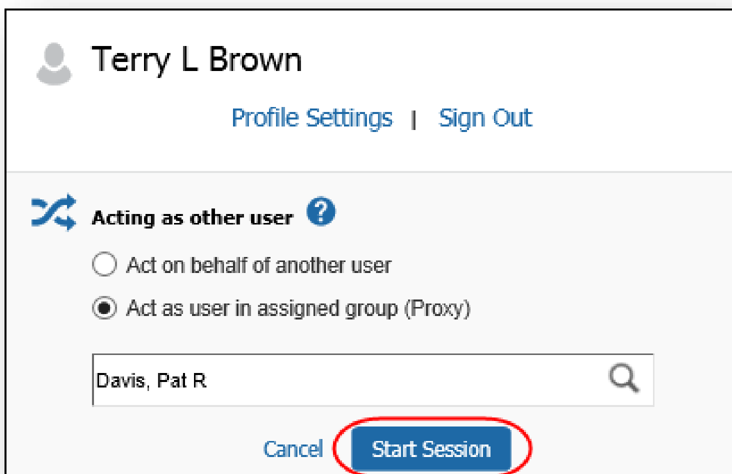
1. Click **Profile**.
2. Select **Act as user in assigned group (Proxy)**. The radio buttons that appear depend on the user roles assigned to the user. If the user only has the Proxy User role, and does not have the Delegate or Travel Arranger roles, the radio buttons will not appear.



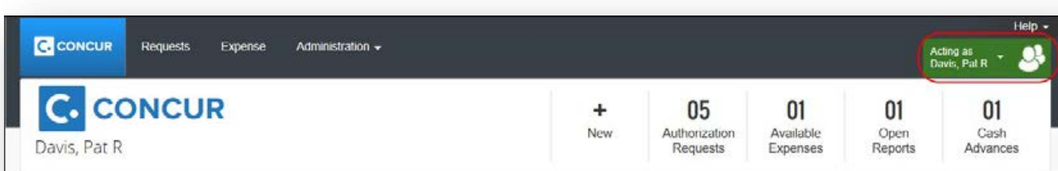
3. Enter the name of the desired user, or select it from the list.



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

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.

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

Printing an Expense Report

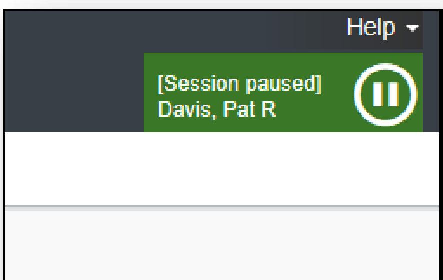
This process behaves the same as when you print a personal expense report. You have the option to print a Detailed Report or Receipt Report for any of the expense reports listed within the employee's **View Reports** page.

Modifying Profile for an Employee

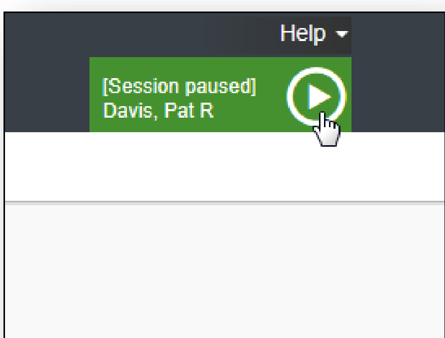
This process behaves the same as when you modify your own Profile. The only differences are that you will be unable to change the password on behalf of the employee, and certain fields may be read-only depending on how the Shared Configuration administrator configured the fields for the Employee form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

Exiting Expense Proxy Logon

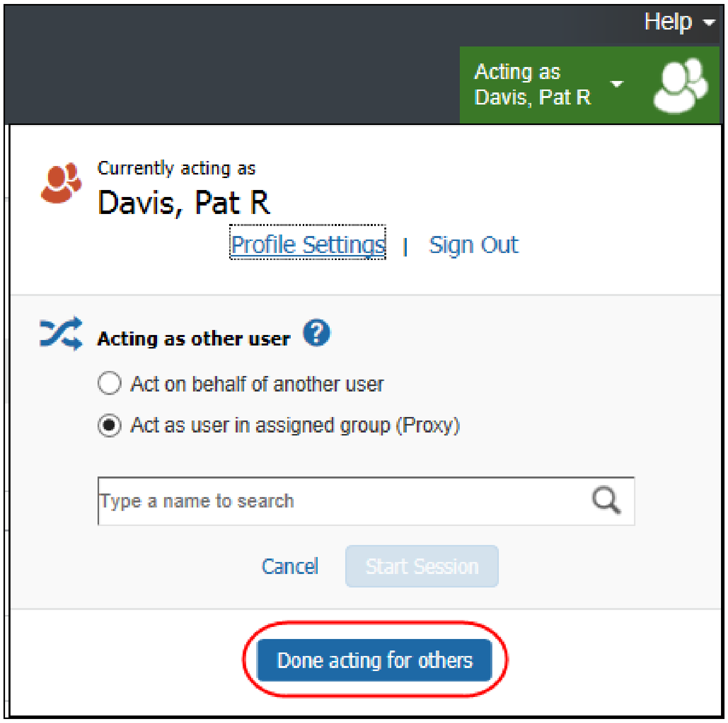
The proxy may access the **Administration** menu while working as a proxy, which causes the proxy session to pause. Once the user selects an item on the **Administration** menu, the **Profile** menu updates to show [**Session paused**], with a pause icon:



To resume the proxy session, on the **Profile** menu, the user hovers the mouse over the pause icon to view the **Play** icon, then clicks.



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



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