# TeamWorks

# Travel and Expense

**Powered By Concur Technologies**

## TTE Local Admin:

Expense Proxy Logon
Handbook 2015

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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 |

# Proxy Logon

## Permissions

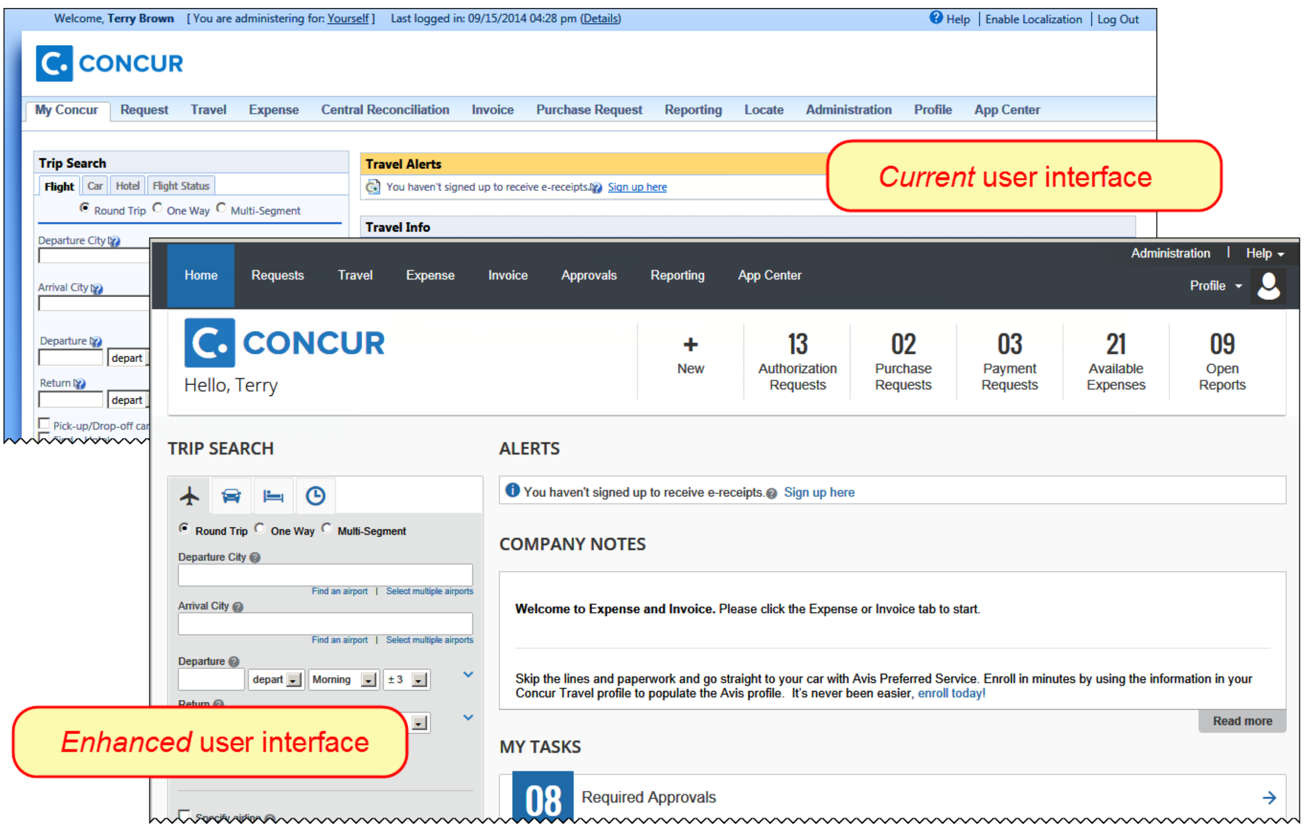
A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, he/she can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, he/she should contact the company's 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 Concur Client Support.

## Two User Interfaces

Concur is in the process of transitioning from the *current* user interface to the *enhanced* user interface.




The enhanced UI brings some long-awaited usability enhancements – some are significant (perhaps involving navigation changes) while others are minor (involving only look-and-feel).

### *This Guide – Sample Screens and Menu Navigation*

For screen samples, this guide may show the *current* UI, the *enhanced* UI, or both. Over time, all screen samples will appear only in the *enhanced* UI.

In those cases where the menu navigation is different, both sets of steps are shown. Example:

1. In the *current* UI, click **Profile** > **Other Settings** (left menu).
   – or –
   In the *enhanced* UI, click **Profile** > **Profile Settings** > **Other Settings** (left menu).

## 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:** The Expense Proxy cannot approve reports or requests 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 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.

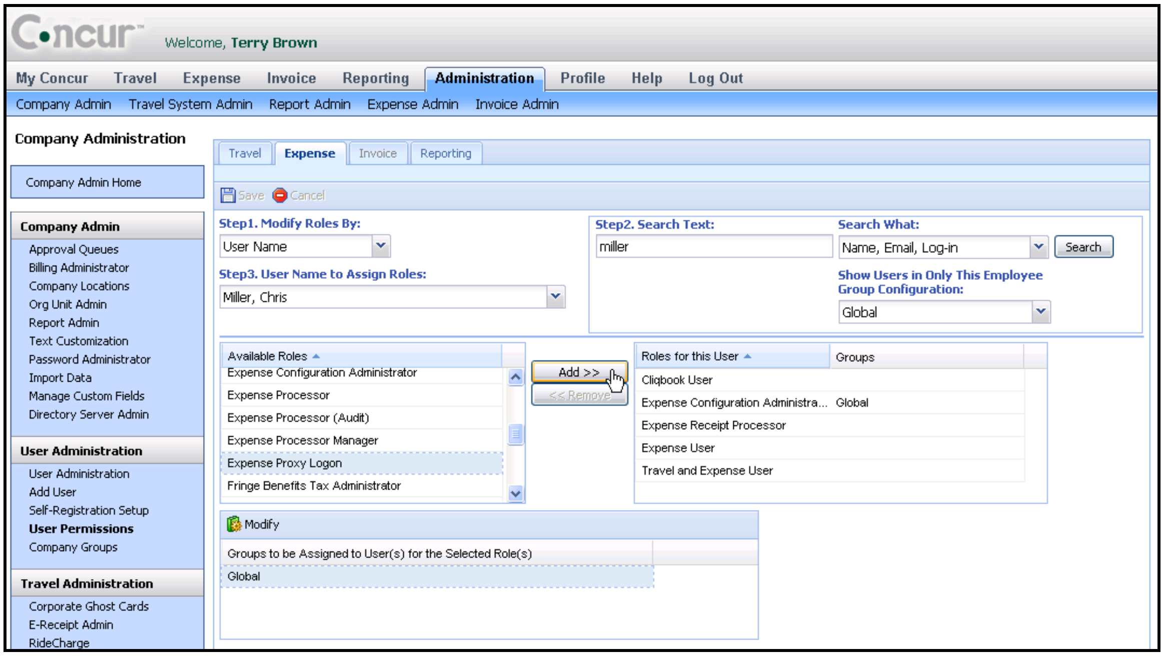
Adding groups to the system can be done manually, or as part of the employee load process. For more information on manual group configuration, refer to the *Shared: Feature Hierarchies and Group Configurations Setup Guide*, or contact your Expense administrator. For more information on the employee import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

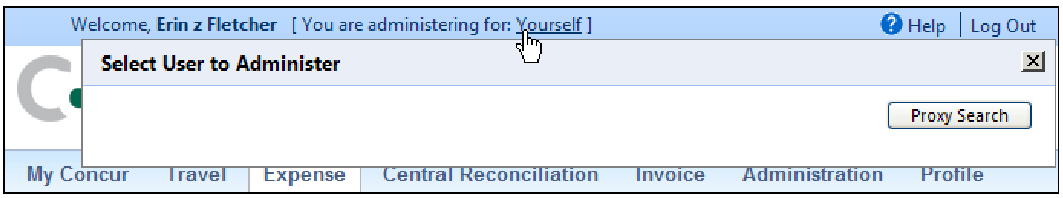
## Proxy Logon Tool

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.

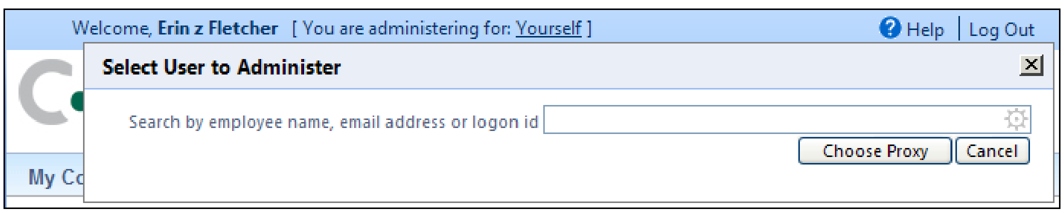
### *Accessing the Expense Proxy Logon Tool –* Current *UI*

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

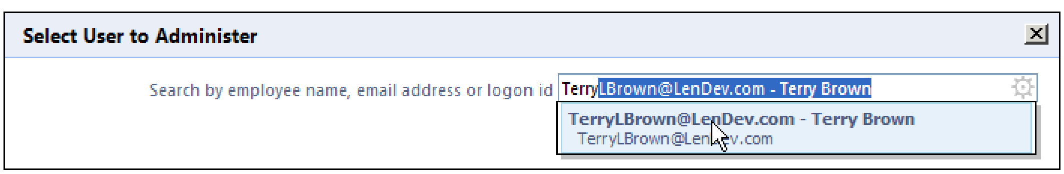
1. On My Concur, click **You are administering for: Yourself**.




Then click **Proxy Search**: the proxy search field appears:




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

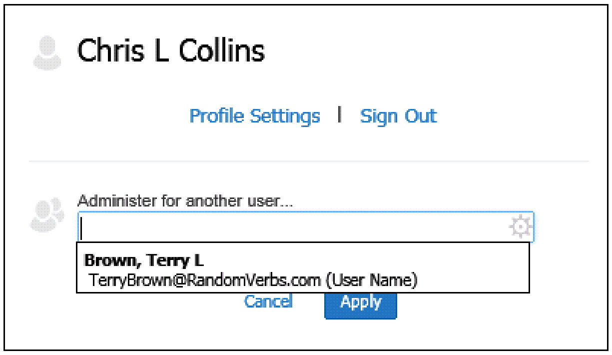



3. Click **Choose Proxy** to log in as the selected user.

### *Accessing the Expense Proxy Logon Tool –* Enhanced *UI*

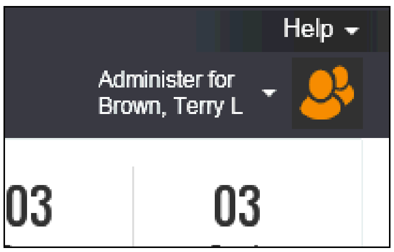
***To access the Expense Proxy Logon tool:***

1. Click **Profile**.




2. Select the desired user, and click **Apply**.

The Profile menu option then becomes **Administer for <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 both the **Active Work** section of My Concur and 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.

## 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 based on the configuration.

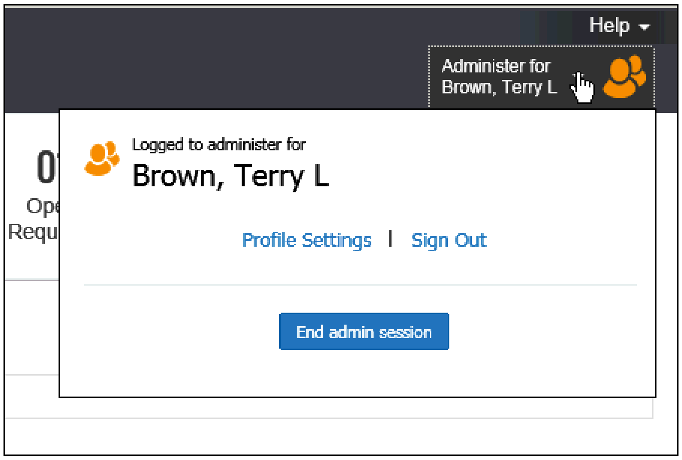
### *Exiting Expense Proxy Logon*

## Current UI

If you are done working as an Expense Proxy, you can return to your own information by returning to the **My Concur** page.

## Enhanced UI

To return to working for himself/herself, the user clicks **Administer for <name>** and then clicks **End admin session**.




### *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