

SAP Concur

PROCUREMENT SERVICES DIVISION



End-USER Training

How to Assign a Delegate in
Concur

The purpose of this job aid is to show users how to assign a delegate to submit on their behalf in Concur.

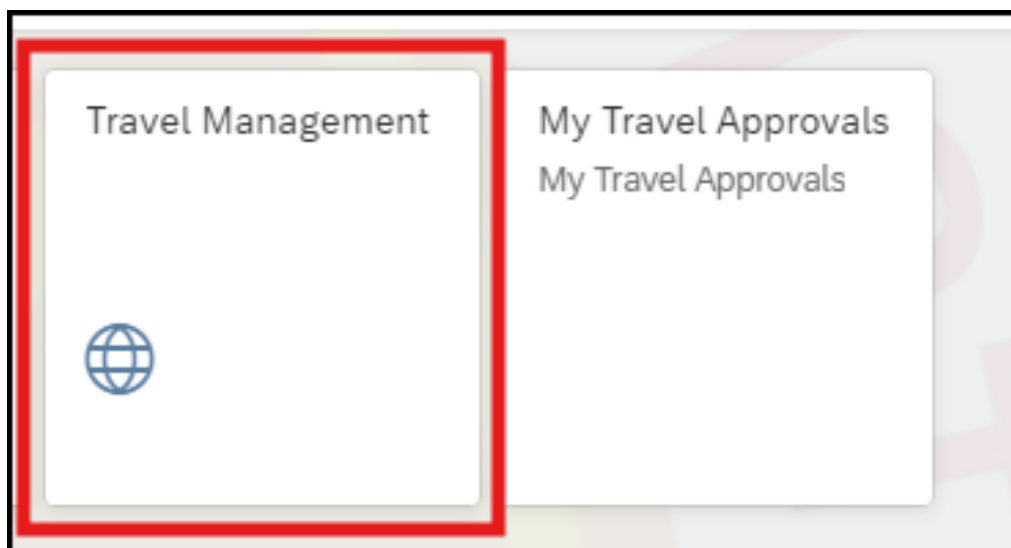
1

To access Concur Travel, log in to your ESS (<https://ess.lausd.net/>) using your SSO (Single Sign On).



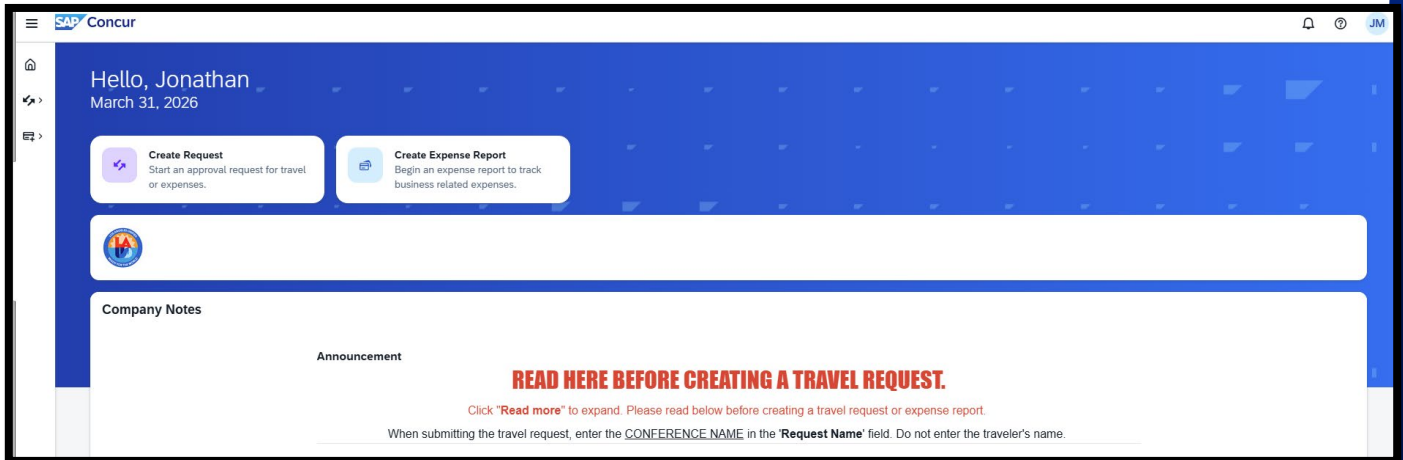
2

Click on the **Travel Management** tile.



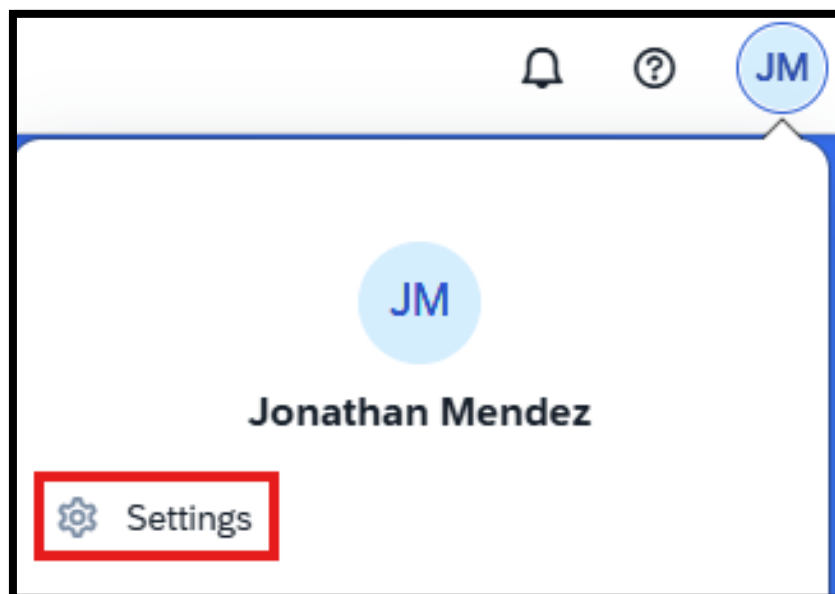
3

You will be directed to the Concur Travel home page. Display may look different depending on your view settings.



4

Click on **your initials** on the top right corner and select **Settings**.



5

Click on **Expense Delegates**.

Profile Options

Select one of the following to customize your user profile.

Personal Information
Personal Information

E-Receipt Activation
Enable e-receipts to automatically receive electronic receipts from participating vendors.

Request Preferences
Select the options that define when you

System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?

Expense Delegates
Delegates are employees who are allowed to perform work on behalf of other employees.

6

In the **Delegates** tab, click **Add** → Search by **Name, Employee ID, or Email** → Click on the desired delegate → Click **Add** again.

Expense Delegates

Delegates

Delegate For

Add **Save** **Delete**

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add **Cancel**

Employee ID: @LAUSD.NET

Logon ID: @LAUSD.NET

Can Book Travel

7

Use the **check boxes** to assign the appropriate permissions to the delegate.

The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the title 'Expense Delegates', there are three buttons: 'Add', 'Save', and 'Delete'. A text block explains: 'Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.' Below this is a table with columns for 'Name', 'Can Prepare', 'Can Book Travel', 'Can Submit Reports', 'Can Submit Requests', 'Can View Receipts', and 'Receives Emails'. The first row shows a delegate with the email '@LAUSD.NET' and the following permissions checked: Can Prepare, Can Submit Reports, Can Submit Requests, Can View Receipts, and Receives Emails. The 'Can Book Travel' permission is unchecked.

<input type="checkbox"/>	Name	Can Prepare	Can Book Travel	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	[Redacted]@LAUSD.NET	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8

Click **Save**.

This screenshot is identical to the previous one, but the 'Save' button is highlighted with a red box, and a red arrow points to it from the text 'Click Save.' below the screenshot.