ASSIGNING A DELEGATE

A delegate is a user who is provided permission to create and submit a Travel Request or Expense Report on behalf of travelers. Users with RT105_0000 Concur Site Travel Specialist role is systematically assigned as a primary delegate for employees within their cost center; however, employees can also assign additional delegates in their profile. This job aid is to provide step-by step instructions on assigning additional delegates.

Requests   Expense   App Center

Support | Help ▾

Profile ▾

Start a Request

Start a Report

Upl Rec

Profile Settings | Sign Out

1

In Concur, click on Profile then click on "Profile Settings."

2

Under Profile Options, click on either "Expense Delegates" or "Request Delegates." You can set up a delegate in either option and the setup will apply to both.

Your Information

Personal Information
Company Information
Contact Information
Email Addresses

Request Settings

Request Information
Request Delegates
Request Preferences
Request Approvers
Favorite Attendees
International Travel

Profile Options

Select one of the following to customize your user profile.

Personal Information
Personal Information

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

Expense Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

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?

Request Preferences
Select the options that define when you receive email notifications. Prompts are pages that appear when you select a certain action, such as Submit or Print.

Change Password
Change your password.

3 Click on "Add" to search for the user based on Name, Email Address or Employee ID. Select the user from the search list, and click on "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

[jldia_____] [Add] Cancel

JL
jldiaz@phoenixteam.com
Employee ID: _____
Logon ID: User1@p0015391oeze.uat

...ns to a delegate, you are assigning pe...

mit Requests   Can View Receipts

n - JL
jldiaz@phoenixteam.com
Employee ID: _____
Logon ID:
ix@p0015391oeze.uat

@LAUSD.NET - Ja
Employee ID: _____
Logon ID: _____@LAUSD.NET.uat

No records

4 Assign appropriate permissions to the delegate using the check box(es) and click on "Save."

Expense Delegates

| Delegates | Delegate For |

[Add] [Save] [Delete]

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.

☐	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
☐	DIAZ, ...com	☑	☑	☑	☑	☑	☐	☐ 🗓 🗓	☑