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# Assigning a Travel Arranger/Assistant

Statewide Travel Program



Content

1. General Information .....	3
1.1 Who can be a Travel Arranger or Assistant? .....	3
1.2 How many Arrangers/Assistants can I have? .....	3
2. Assigning an Arranger/Assistant .....	4
3. Additional Resources .....	7

# 1. General Information

## 1.1 Who can be a Travel Arranger or Assistant?

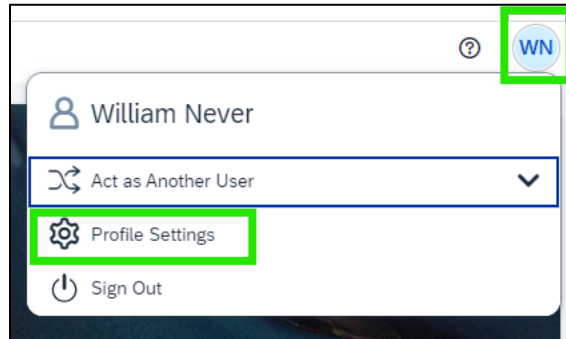
Arranging or assisting with booking travel reservations is appropriate for any agency employee with a Concur profile. This feature is often used by Travel Coordinators for their agency's travelers.

## 1.2 How many Arrangers/Assistants can I have?

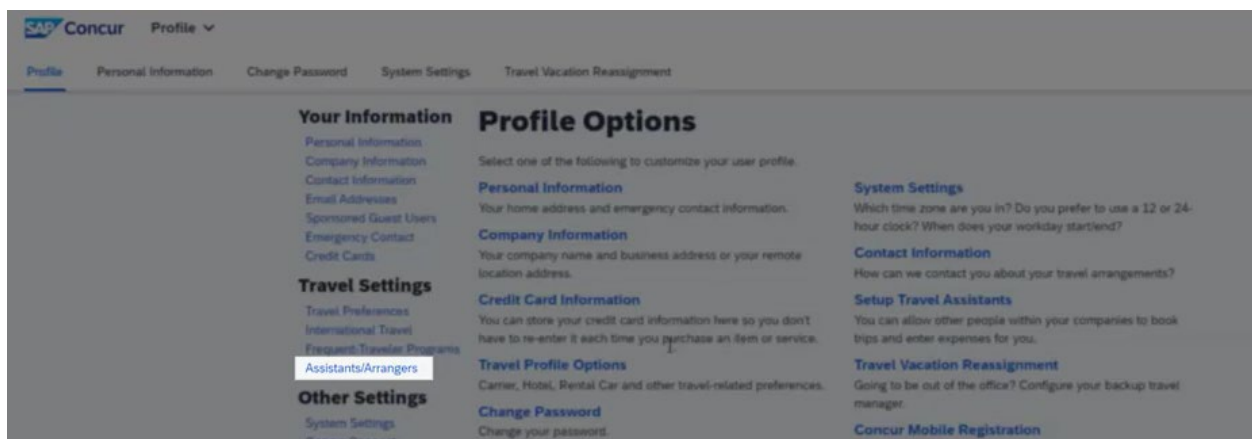
You can add as many Assistants or Arrangers as you would like, but only one can be the primary assistant. The primary assistant **MUST** have an office/work telephone in their profile. The primary assistant will always receive an email copy of the itinerary for the traveler, regardless of who made the reservation (primary assistant, other travel arranger/assistant or traveler). The primary assistant can modify the traveler's profile as needed. All assistants are authorized to book travel on your behalf.

## 2. Assigning an Arranger/Assistant

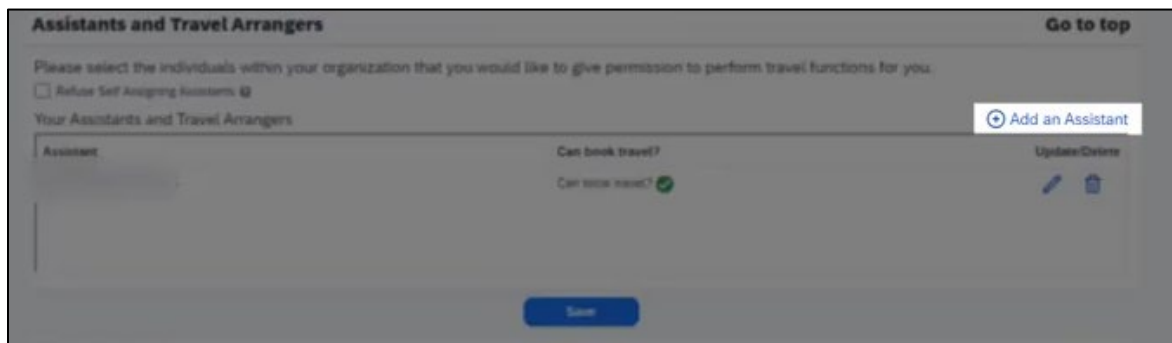
To add a travel arranger/assistant, click on 'Profile Settings' in the top right blue circle after you've logged in.



Scroll down to Assistants/Arrangers or click on 'Assistants/Arrangers' from left menu under 'Travel Settings'.

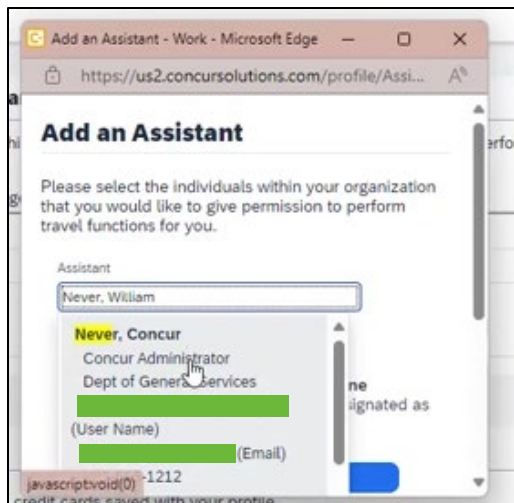


Click on '+Add an Assistant' from the right side of the box titled Assistants and Travel Arrangers.

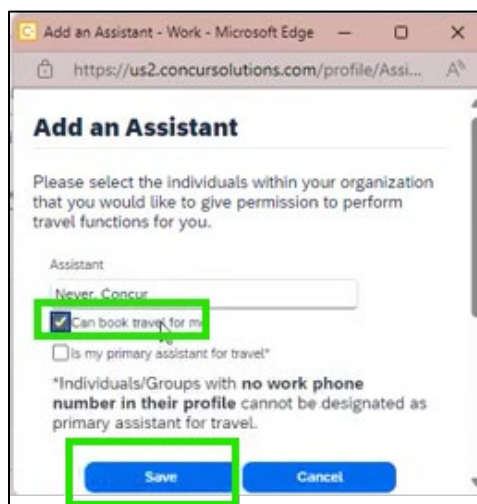


Enter the assistant's name in the search criteria field. Select your assistant from the available search results. Whomever you choose to be your travel assistant must have a Concur profile before you can search for and choose them.

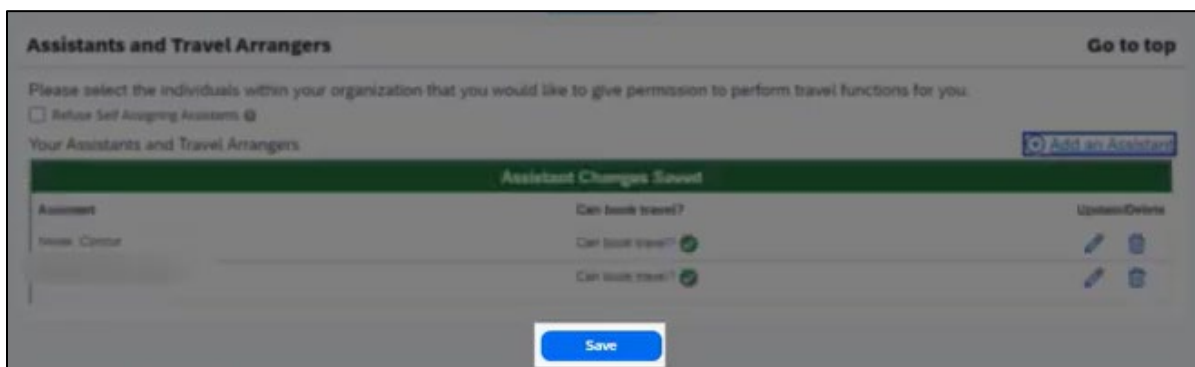
## ASSIGNING A TRAVEL ARRANGER/ASSISTANT



Click the 'Can book travel for me' box and click 'Save.'



Click 'Save' again on the profile page.



You will know you were successful because you will see a green box that says, 'profile saved.'

## ASSIGNING A TRAVEL ARRANGER/ASSISTANT

The screenshot displays the Concur Profile management interface. At the top, the Concur logo and 'Profile' dropdown are visible. Below the header, a navigation bar lists several options: Profile, Personal Information, Change Password, System Settings, and Travel Vacation Reassignment. The main content area is divided into three columns. The left column, titled 'Your Information', lists links for Personal Information, Company Information, Contact Information, Email Addresses, Sponsored Guest Users, Emergency Contact, and Credit Cards. The middle column, titled 'Profile Options', includes sections for Personal Information (with a description: 'Select one of the following to customize your user profile.'), Company Information, Credit Card Information, Travel Profile Options, and Change Password. The right column, titled 'System Settings', includes sections for System Settings, Contact Information, Setup Travel Assistants, Travel Vacation Reassignment, and Concur Mobile Registration. A green 'Profile Saved' notification box is located in the top right corner of the main content area.

**Concur** Profile

Profile Personal Information Change Password System Settings Travel Vacation Reassignment

**Your Information**

- Personal Information
- Company Information
- Contact Information
- Email Addresses
- Sponsored Guest Users
- Emergency Contact
- Credit Cards

**Travel Settings**

- Travel Preferences
- International Travel
- Frequent Traveler Programs
- Assistants/Managers

**Other Settings**

- System Settings
- Concur Connect

**Profile Options**

Select one of the following to customize your user profile.

**Personal Information**

Your home address and emergency contact information.

**Company Information**

Your company name and business address or your remote location address.

**Credit Card Information**

You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

**Travel Profile Options**

Carrier, Hotel, Rental Car and other travel-related preferences.

**Change Password**

Change your password.

**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?

**Contact Information**

How can we contact you about your travel arrangements?

**Setup Travel Assistants**

You can allow other people within your companies to book trips and enter expenses for you.

**Travel Vacation Reassignment**

Going to be out of the office? Configure your backup travel manager.

**Concur Mobile Registration**

Set up access to Concur on your mobile device.

Profile Saved

### 3. Additional Resources

As a traveler, your first resource for all travel-related inquiries is your agency Travel Coordinator(s). Other helpful resources are:

[Statewide Travel Program Training Resources Page](#)

[CI Azumano Webpage](#)

[Concur Login Page](#)