

How to Assign and Remove a Travel Arranger/Assistant

Statewide Travel Program

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2. General Information

What is a Travel Arranger/Assistant?

A Travel Arranger/Assistant has permission to book travel within Concur on a traveler's behalf. Sometimes this is one individual for multiple staff members.

Arrangers are required to follow all policies, but they have no other duties related to travel outside of booking, as this is a Concur-based feature.

What is a Travel Coordinator?

Each agency has its own Travel Coordinator. In most cases, this is a team of people who assist their travelers.

Travel Coordinators act as an intermediary between Statewide Travel Program and the traveler. Travel Coordinators are also responsible for managing the agency's travel program and compliance within their agencies.

Who can be a Travel Arranger/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.

Travelers can add or remove a Travel Arranger/Assistant at any time.

How many Travel Arrangers/Assistants can I have?

You can add as many Travel Arrangers/Assistants as you would like. All Travel Arrangers/Assistants will be authorized to book travel on your behalf.

What is the Primary Travel Assistant?

There may only be *one* primary Travel Assistant per traveler. The primary assistant **MUST** have a Concur profile that includes an office/work telephone in their profile.

The primary Travel Assistant will always receive an email copy of the itinerary for the traveler, regardless of who made the reservation (primary Travel Arranger/Assistant, other Travel Arranger/Assistant, or traveler). The primary Travel Arranger/Assistant can modify the traveler's profile if needed.

When do I remove a Travel Arranger/Assistant?

You may want to delete a Travel Arranger/Assistant for many reasons, including but not limited to:

- Arranger has left the agency
- Arranger was assigned accidentally
- Arranger or traveler has a new role within the agency

When do I remove myself as a Travel Arranger/Assistant?

You may want to remove yourself as a Travel Arranger/Assistant for many reasons, including but not limited to:

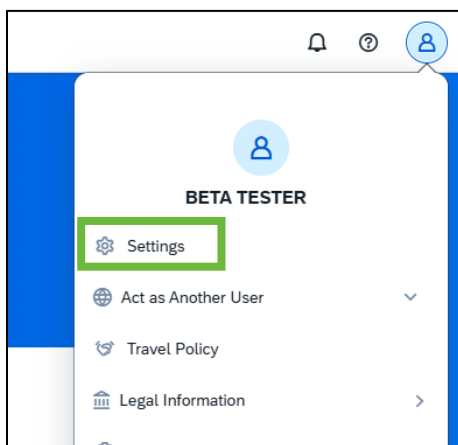
- Traveler has left the agency
- Assigned to traveler accidentally
- Arranger or traveler has a new position within the agency

3. Assign a Travel Arranger/Assistant as a Traveler

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. After logging in, click the icon at the top right corner.



Click "Settings" to assign a Travel Arranger/Assistant.



There are two options to find your Travel Arrangers/Assistants.

- A. Click "Assistants/Arrangers" under "Travel Settings."
- B. Click "Setup Travel Assistants" under "Profile Options."

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/Arrangers](#)

Other Settings

- [System Settings](#)
- [Concur Connect](#)
- [Change Password](#)
- [Travel Vacation Reassignment](#)
- [SAP Concur Mobile App](#)
- [I'm Assisting...](#)

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.

SAP Concur Mobile App
Set up access to Concur on your mobile device

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B

HOW TO ASSIGN AND REMOVE A TRAVEL ARRANGER/ASSISTANT

Your profile page will load directly to the “Assistants and Travel Arrangers” box. Click “Add an Assistant.”

A pop-up will appear.

Enter the Assistant's name in the search criteria field. A drop-down menu will appear with options from your agency. Select the Travel Arranger/Assistant from the available search results.

Important: Anyone without a Concur profile will not appear in the search results.

Click the “Can book travel for me” box. If you would like this person to be your primary Travel Arranger/Assistant, check that box as well.

Click "Save."

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant
Never, William

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with **no work phone number in their profile** cannot be designated as primary assistant for travel.

Save **Cancel**

Once the page reloads you will see a green box that says, "Assistant Changes Saved." The Travel Arranger/Assistant that you added will appear under "Assistants and Travel Arrangers."

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers Add an Assistant

Assistant Changes Saved

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? ✔	✎ 🗑️

Click "Save" again on the profile page.

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers Add an Assistant

Assistant Changes Saved

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? ✔	✎ 🗑️

Save

Once the page reloads you will see a green box that says, "Profile Saved."

Your Information Profile Saved

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

Profile Options

Select one of the following to customize your user profile.

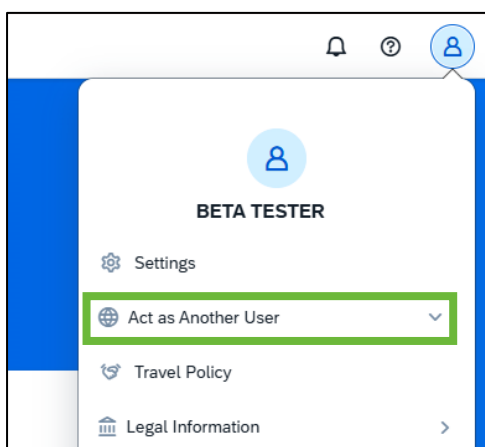
- Personal Information**
Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- System Settings**
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does your workday start/end?
- Contact Information**
How can we contact you about your travel arrangements?

4. Assign a Travel Arranger/Assistant as an Arranger

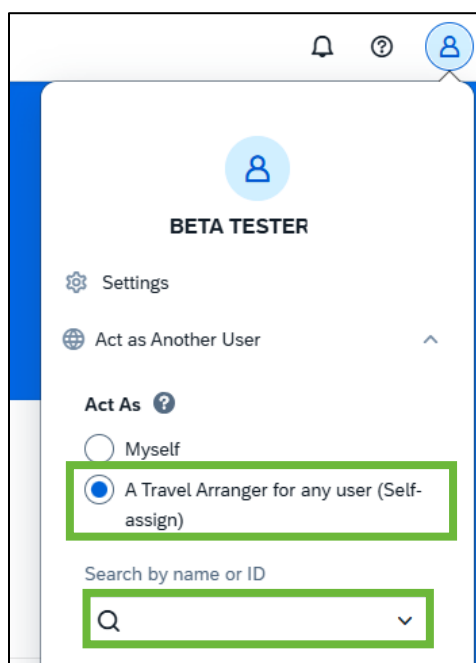
Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. After logging in, click on the icon at the top right corner.



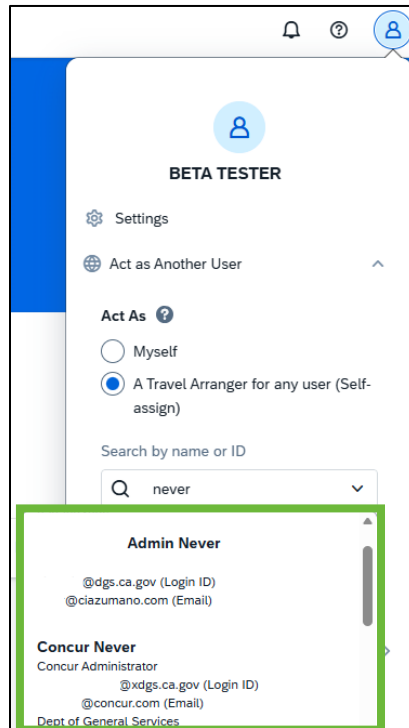
Click "Act as Another User" to assign yourself as a Travel Arranger/Assistant.



Click "A Travel Arranger for any user (Self-Assign)." Enter the traveler's name in the search box.

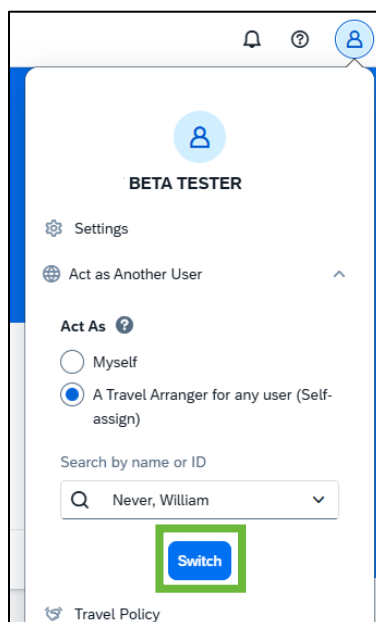


A drop-down menu will appear with options from your agency. Select the traveler from the available search results.



Important: Anyone without a Concur profile will not appear in the search results.

Once you have selected the correct traveler, click "Switch."



HOW TO ASSIGN AND REMOVE A TRAVEL ARRANGER/ASSISTANT

The page will reload with a note that shows you are “acting as” another user.

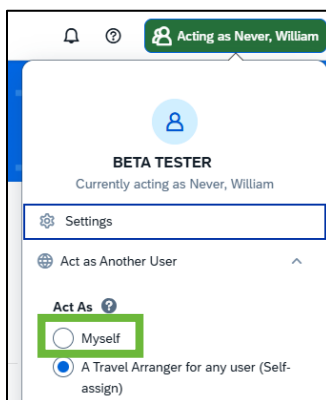


Book travel as needed for this traveler. See the video and/or guide 'How to Assist or Arrange a Trip' for more information.

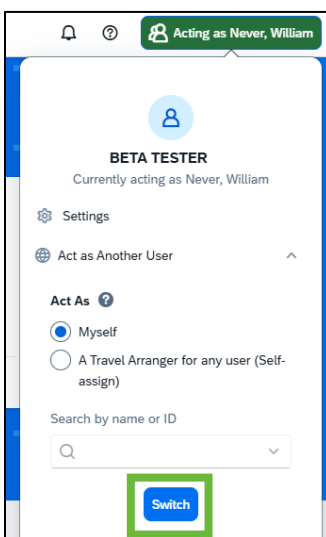
Once you are done assisting this traveler, click “Acting as (Traveler Name).”



Under “Act As,” click “Myself” to return to your Concur profile.



Click “Switch.”



HOW TO ASSIGN AND REMOVE A TRAVEL ARRANGER/ASSISTANT

When the page reloads, the green “Acting as...” label has been replaced with a blue person icon.

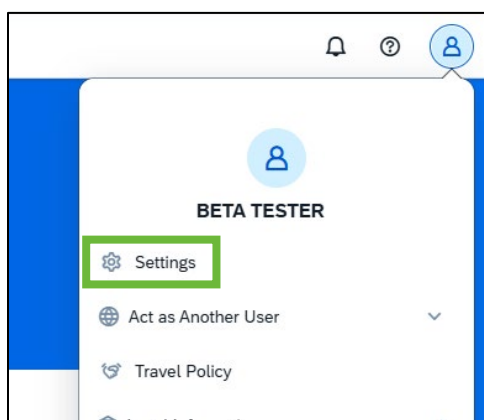


5. Remove a Travel Arranger/Assistant as a Traveler

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. After logging in, click on the icon at the top right corner.



Click "Settings" to assign a Travel Arranger/Assistant.



There are two options to find your Travel Arrangers/Assistants.

- Click "Assistants/Arrangers" under "Travel Settings."
- Click "Setup Travel Assistants" under "Profile Options."

Your Information

- Personal Information
- Company Information
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- Emergency Contact
- Credit Cards

Travel Settings

- Travel Preferences
- International Travel
- Frequent-Traveler Programs
- Assistants/Arrangers**

Other Settings

- System Settings
- Concur Connect
- Change Password
- Travel Vacation Reassignment
- SAP Concur Mobile App
- I'm Assisting...

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 e time you purchase an item or service.

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

Change Password
Change your password.

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

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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.

SAP Concur Mobile App
Set up access to Concur on your mobile device

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HOW TO ASSIGN AND REMOVE A TRAVEL ARRANGER/ASSISTANT

Your profile page will load directly to the “Assistants and Travel Arrangers” box. Find the Arranger you would like to remove and click the trash can icon next to their name.

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? ✔	

A pop-up will appear to confirm the removal. Click “OK.”

us2.concursolutions.com says
Click OK to delete this assistant. Click Cancel to stop.

OK Cancel

Once the page reloads you will see a green box that says, “Assistant Changes Saved.” The Travel Arranger/Assistant that you removed will no longer appear under “Assistants and Travel Arrangers.”

Assistant Changes Saved

You currently have no assistants defined.

Click “Save” again on the profile page. If you do not click save, the deletion will **not** be saved.

Save

Once the page reloads you will see a green box that says, “Profile Saved.”

Profile Saved

Your Information
Personal Information
Company Information
Contact Information
Email Addresses
Sponsored Guest Users

Profile Options
Select one of the following to customize your user profile.
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Your home address and emergency contact information.

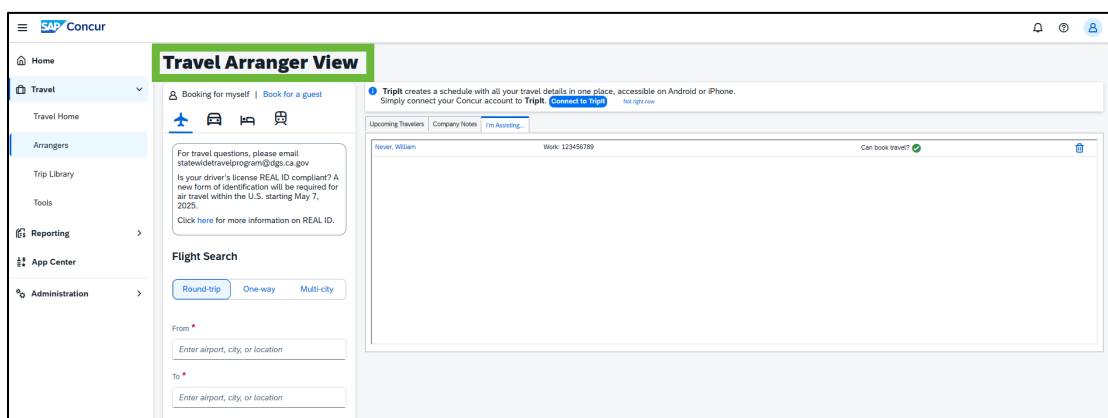
System Settings
Which time zone are you in? Do you prefer to use a 12 or 24-hour clock? When does

6. Remove a Travel Arranger/Assistant as an Arranger

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information. After logging in, click "Travel," "Arrangers."



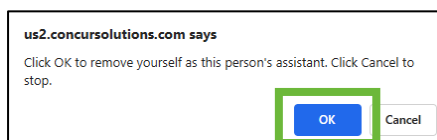
The "Travel Arranger View" page will load.



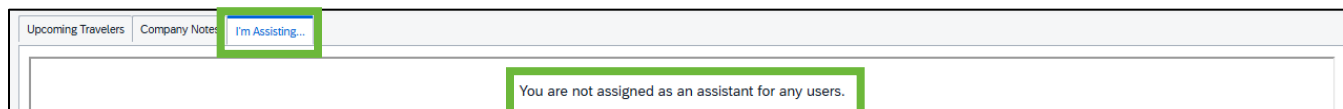
Within the "I'm Assisting" tab, find the traveler you would like to remove and click the trash can icon next to their name.



A pop-up will appear to confirm the removal. Click "OK."



Once the page reloads, you will see that the traveler is no longer listed under the "I'm Assisting" tab.



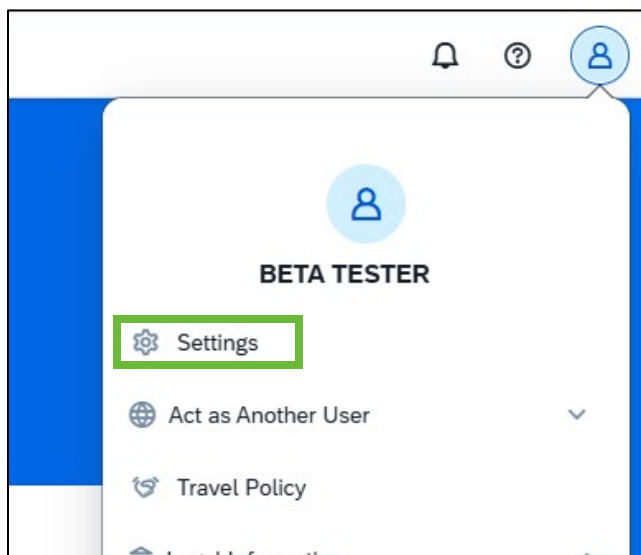
7. Edit a Travel Arranger/Assistant

Log into Concur. See the video and/or guide 'How to Log into Concur' for more information.

After logging in, click on the icon at the top right corner.



Click "Settings" to assign a travel arranger/assistant.



There are two options to find your Travel Arrangers/Assistants.

- A. Click "Assistants/Arrangers" under "Travel Settings."
- B. Click "Setup Travel Assistants" under "Profile Options."

<p>Your Information</p> <ul style="list-style-type: none"> Personal Information Company Information Contact Information Email Addresses Sponsored Guest Users Emergency Contact Credit Cards <p>Travel Settings</p> <ul style="list-style-type: none"> Travel Preferences International Travel Frequent-Traveler Programs Assistants/Arrangers <p>Other Settings</p> <ul style="list-style-type: none"> System Settings Concur Connect Change Password Travel Vacation Reassignment SAP Concur Mobile App I'm Assisting... 	<p>Profile Options</p> <p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Company Information Your company name and business address or your remote location address.</p> <p>Credit Card Information You can store your credit card information here so you don't have to re-enter it e</p> <p>Travel Profile Options Carrier, Hotel, Rental Car and other travel-related preferences.</p> <p>Change Password Change your password.</p>	<p>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?</p> <p>Contact Information How can we contact you about your travel arrangements?</p> <p>Setup Travel Assistants You can allow other people within your companies to book trips and enter expenses for you.</p> <p>Travel Vacation Reassignment Going to be out of the office? Configure your backup travel manager.</p> <p>SAP Concur Mobile App Set up access to Concur on your mobile device</p>
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HOW TO ASSIGN AND REMOVE A TRAVEL ARRANGER/ASSISTANT

Under “Assistants and Travel Arrangers” find the Travel Arranger/Assistant you would like to edit. Click the pencil icon next to their name.

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

A pop-up will appear.

Edit an Assistant

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

Assistant
Never, William

Can book travel for me

Is my primary assistant for travel

You will not be able to edit the Travel Arranger/Assistant's name. If you would like to remove them, please see section 5 of this document.

Edit the permissions this user should have. Uncheck or check “Can book travel for me” and/or “Is my primary assistant for travel” boxes.

Edit an Assistant

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

Assistant
Never, William

Can book travel for me

Is my primary assistant for travel

Click “Save Changes.”

Edit an Assistant

William is currently allowed to perform those functions that are checked for you. To change these settings, check/uncheck as appropriate.

Assistant
Never, William

Can book travel for me

Is my primary assistant for travel

Once the page reloads you will see a green box that says, "Assistant Changes Saved."

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers [Add an Assistant](#)

Assistant Changes Saved

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	Edit Delete

Click "Save" again on the profile page.

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers [Add an Assistant](#)

Assistant Changes Saved

Assistant	Can book travel?	Update/Delete
Never, William (Primary Travel Asst.)	Can book travel? <input checked="" type="checkbox"/>	Edit Delete

[Save](#)

Once the page reloads, you will see a green box that says, "Profile Saved."

Your Information Profile Saved

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Travel Settings

Profile Options

Select one of the following to customize your user profile.

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Your home address and emergency contact information.
- Company Information**
Your company name and business address or your remote location address.
- Credit Card Information**
- 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?

8. Additional Resources

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

8.1 CI Azumano

Email: CalTravel@ciazumano.com

Travel Agents: (877) 454-8785 (use only if trip is in progress)

- [CI Azumano Webpage](#)
- [Concur Login Page](#)

8.2 Statewide Travel Program

Email: StatewideTravelProgram@dgs.ca.gov

Find the following videos and guides on the [Statewide Travel Program Training Resources Page](#):

- How to Book Air
- How to Book Lodging
- How to Book a Rental Car
- How to Book Train
- How to Log into Concur
- How to Assist or Arrange a Trip