Concur Tips and Tricks

Setting up a Travel Assistant

If a Traveler wants someone to book travel on their behalf or view their specific travel details then they will need to set them up as a Travel Assistant

Step 1 – Log into Concur	Step 2 – Open your Profile
From your myUMB portal page click the Concur Travel & Expense icon Concur Travel & Expense (For Pilot Groups)	Select the Profile icon in the top right hand corner of Concur. Administration - Help - Profile - O
Step 3 – Select Profile Settings	Step 4 – Select Assistants/Arrangers
Select the Profile Settings link Luke Quell Profile Settings Sign Out Acting as other user Search by name or D Cancel Start Setsion	On the left side of the screen select Assistants/ArrangersYour Information Personal Information Company Information Contact Information Contact Information Contact Information Credit CardsProfile Options Select one of the following to custor Personal Information Your home address and emergencyTravel Settings Travel Preferences International Travel Frequent-Traveler Programs Assistants/ArrangersProfile Options Select one of the following to custorCompany Information Contact Information Contact Information Contact Information Contact Information Contact Information Travel Preferences International Travel Frequent-Traveler Programs Assistants/ArrangersPersonal Information Your company name and business Iocation address.Credit Card Information You can store your credit card infon to re-enter it each time you purchasPerceipt Activation Enable e-receipts to automatically r
Step 5 – Select Add an Assistant	Step 6 – Search for and Add an Assistant
Select Add an Assistant Assistants and Travel Arrangers Pease select the individuals within your organization that you would like to give permission to perform travel functions for you. Pease select the individuals within your organization that you would like to give permission to perform travel functions for you. Image: Colspan="2">Output Your Assistants and Travel Arrangers: Image: Colspan="2">Output Your Assistant Changes Saved You currently have no assistants defined.	Search for the name of an existing Concur user, select "Can book travel for me", and select Save. If there is a problem with your booking and you want the Travel agent to contact your Travel Assistant you should also check the box for "Is my primary assistant for travel" Add an Assistant Please select the individuals within your organization that you would like to give permission to perform travel functions for you. Assistant Very, Alma Cancel