

Step-by-Step Guide

Identifying Travel Arrangers in the Concur Travel & Expense System

What is a Travel Arranger?

A travel arranger (also called a travel assistant) is an individual authorized to book travel, in the Concur Travel & Expense System, on behalf of another person. (This role is not needed to use Christopherson Business Travel to book travel on behalf of another person.) Travel arrangers can view another's upcoming trips, within Concur, whether those trips were booked using Concur or Christopherson Business Travel.

Delegates are assigned for expense report processing, while travel arrangers are assigned for travel processing. Delegates and travel arrangers are not necessarily the same people. An individual can be just a delegate, just a travel arranger, or both a delegate and a travel arranger.

Accessing Your Travel Settings

Travel arrangers are identified as part of your travel settings, which are located under your Concur Profile.

1. Begin by accessing Concur via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **Concur Travel & Expense System** link.
2. From your Concur home page, click **Profile** (upper left corner of your screen).
3. Using the left-side menu, under the Travel Settings section click **Assistants/Arrangers**.

The screenshot shows the 'My Profile' page in the Concur system. The left-hand navigation menu includes 'Your Information', 'Travel Settings', and 'Expense Settings'. Under 'Travel Settings', the 'Assistants/Arrangers' option is circled in red. The main content area is titled 'Assistants and Travel Arrangers' and contains instructions for selecting individuals to give permission to perform travel functions. A list of assistants is shown, with one entry: 'Damiano-Nittoli, Leslie M. (Primary Travel Asst.)' with a 'Can book travel?' checkbox checked. There are also links for 'Change Picture' and '+ Add an Assistant'.

If you already have travel arrangers identified, they will appear here.

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Adding Travel Arrangers

Note: If you have 25 or more travel arrangers to add, you can instead submit the [Travel Arranger \(TA\) form](#).

To add someone to book travel on your behalf, click the **Add an Assistant** link (right side of section).

1. In the **Search Criteria** field, enter the travel arranger's name. Use the following format: LastName,FirstName (no space after the comma). For example: Smith,Joan.

Click the **Search** button.

2. Verify the appropriate individual appears in the **Assistant** field. If needed, use the dropdown to see a list of individuals matching your search criteria and select the appropriate name.

3. Check the **Can book travel for me** checkbox.

4. A primary travel arranger will receive an emailed itinerary no matter who books your trips. **Note:** *You can only have one **primary** travel arranger.*

If you want to identify this individual as your one primary travel arranger, check the **Is my primary assistant for travel** checkbox. (This individual must have a work phone number saved in his or her own Concur Profile before he or she can be designated as your primary travel arranger.)

5. Click the **Save** button at the bottom of this section.

Deleting Travel Arrangers

Note: If you have 25 or more travel arrangers to remove – or any number of inactive travel arrangers – instead submit the [Travel Arranger \(TA\) form](#).

To remove someone from your travel arranger list because you no longer want him or her to book travel on your behalf:

Locate the appropriate individual and, on the far right of your screen, click the red X in line with that individual's name.

You will receive a pop-up message for verification.

To remove the travel arranger from your list, click **OK**.