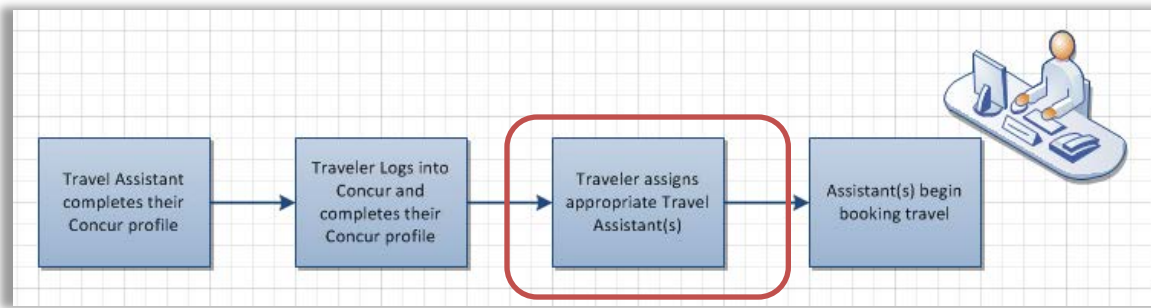


## Assigning a Travel Assistant/Arranger:

The chart below highlights the steps to set up a Travel Assistant in the Concur booking tool.

**NOTE:** It is important that the Travel Assistant complete their profile prior to being added as assistant. If the assistant's profile is not completed first, that assistant may not receive all notifications from Concur.



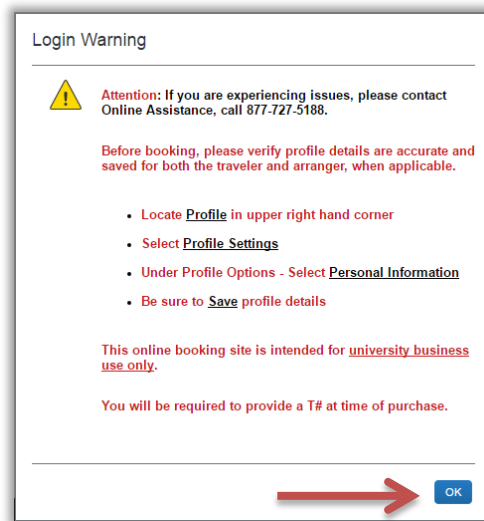
## Assigning your Travel Assistant:

Assigning a travel assistant allows that person to book travel (e.g. airfare) on your behalf, by giving them access to your profile in the Concur system.

This guide will focus specifically on the process for adding a Travel Assistant/Arranger. If you would like a more detailed look at completing the profile please see the guide titled: “Completing Your Profile” located at [busfin.osu.edu/buy-schedule-travel/travel](http://busfin.osu.edu/buy-schedule-travel/travel).

1. Navigate to the Concur tool via the OSU Travel website ([busfin.osu.edu/buy-schedule-travel/travel](http://busfin.osu.edu/buy-schedule-travel/travel))
  - Select “Book Travel Online”
  - You will then be prompted to enter your OSU login credentials, this is your *name.#* and associated password.

- After logging in you will receive a popup with important information to note.
- Read the dialog box and then select “Ok.”



2. If you have not already completed your profile, you will need to fill in all required fields (listed below) prior to assigning your travel assistant.

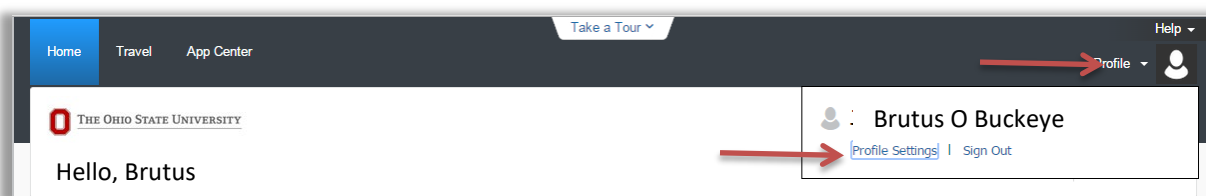
For more information on completing your profile see the guide titled: “Completing Your Profile” located at [busfin.osu.edu/buy-schedule-travel/travel](http://busfin.osu.edu/buy-schedule-travel/travel).

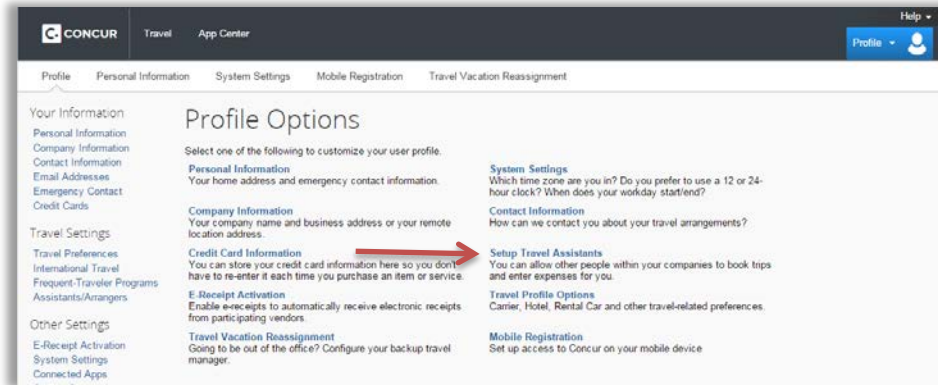
A. Required profile fields are:

- First Name, Middle Name/Initial or “No Middle Name” radio button, Last Name
- Work Phone
- Home Phone
- Emergency Contact Name and Phone
- Gender
- Date of Birth

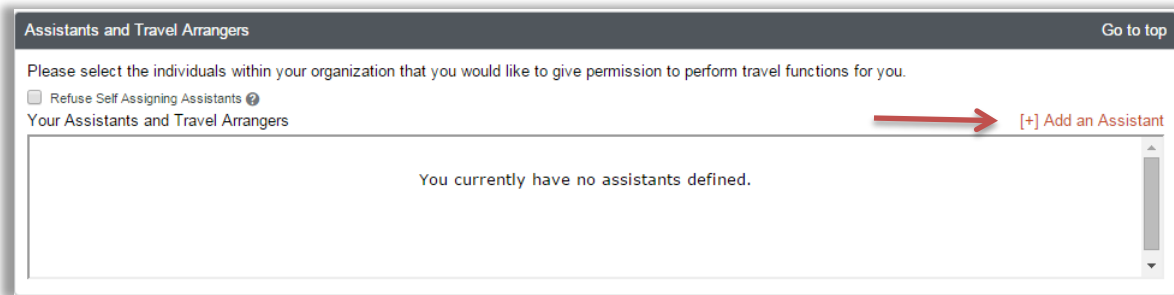
3. To navigate directly to the “Assistants and Travel Arrangers” section of your Concur Profile follow the path below:

- Select **Profile > Profile Settings > Setup Travel Assistants**





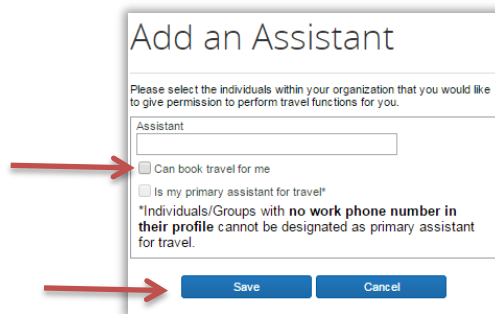
4. Select the “Add an Assistant” link



5. When the dialogue box comes up, search for the name of the person you would like to add. With their name selected check the “Can book travel for me” and select save.

A. You can search by *FirstName LastName* (No comma); by email address, or employee ID.

Repeat as needed for additional travel assistants. Make sure to select “save” each time.




After selecting save, the assistant will show up in your profile under the “Assistants and Travel Arrangers Section.”

Note: No notification will be sent to the assistant letting them know they have been assigned. It is recommended that once they are added, you communicate to them that they may now book travel on your behalf.





If you ever need to remove a travel assistant, you may do so by selecting the trash can icon beside their name.  
Last Updated February 2018

**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

|                    |  |   |
|--------------------|--|---|
| Peterson, Marie L. | Can book travel?  |   |
| Tobias, Joseph R.  | Can book travel?  |   |
|                    |  |   |

If you have any questions, or need further assistance please contact the Travel Office at 614-292-9290 or [travel@osu.edu](mailto:travel@osu.edu).