



Procedure for Self-Assigning a Concur Travel Assistant

Procedure #: _____

Rev.: _____

Effective Date: _____

Related Policy: [UW-Madison Travel Policy](#)

Functional Owner: Accounting Services, Division of Business Services

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I. Procedure Statement

Certain University employees need to assign another UW employee to reserve travel on their behalf using Concur Travel. Concur Travel has a self-assignment feature allowing one Concur Travel user to assign another Concur Travel user to reserve travel for them.

II. Who is Affected by This Procedure

University employees with access to Concur Travel.

III. Procedure

Step 1: Log in to Concur Travel: [Concur Travel Log In](#)

Step 2: Select Profile/Profile Settings/Set up Travel Assistants

Step 3: Select Add an Assistant

Step 4: Enter the last name and first name of the employee/Travel Assistant in a Last Name (space) First Name format

Step 5: Check the Can book travel for me box

Step 6: Select Save

Step 7: Select Save again

Procedure for Requesting Access to Concur Travel

IV. Contact Roles and Responsibilities

- A. **Requester:** Current Concur Travel user responsible for self-assignment of a Concur Travel Assistant

V. Definitions

- A. **Concur Travel:** Online travel reservation system used by UW-Madison to reserve University business related travel.
- B. **Concur Travel Assistant:** Any current Concur Travel user.

VI. Related References

- [UW-Madison Travel Policy](#)

VII. Revisions

Procedure Number	
Date Approved	
Revision Dates	