

## Setting up your assistant in Concur

### Concur:

1. Company ID: opbc2b78md2bcd6c (just copy and paste this).
2. Login to Concur Expense: <http://my.concureworkplace.com>
3. Click on My Info button in the upper right corner
4. Click on Expense tab
5. Click on Administrative Assistant
6. Click on the magnifying glass icon, when the popup window opens, type <ASSISTANT'S LAST NAME> in the last name field
7. Click on her name that will appear in blue letters and click on Save.
8. Click on the Home Page button and log out of Concur.

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### Concur Status Messages

You may also want to add your AC to your Concur status messages. This will allow the AC to be notified if there are any problems or issues that need to be corrected with your submitted report.

The Systems Dept has devised a simple solution to an issue that was a source of frequent complaints - the preparer of an expense report (admin. assistant) is not notified about changes in the status of their manager's expense report.

The problem was that the accounting would send an expense report back for corrections and only the cardholder was notified via Concur's automated email status updates, but the assistant was unaware that he/she needs to log in to Concur to fix the report.

The Systems Dept has set up an Auto-forwarding rule in the Outlook, which automatically forwards to your assistant all messages sent to you from [status\\_updates@concureworkplace.com](mailto:status_updates@concureworkplace.com) when the subject lines begin with:

- *The Approval status has changed on the following expense report:*
- *The Payment status has changed on the following expense report:*

If you would like to have this rule set up in your Outlook, please send a [Trouble Ticket](#) to the Systems Department with your request. Please specify the name of the assistant to whom the emails should be forwarded.

This will not work if you have previously asked to disable the email status updates from Concur.