

Travel: Travel Arranger View

Travel Service Guide

Last Revised: October 18, 2023

Applies to Concur Travel:

- ☒ Professional/Premium edition
 - ☒ TMC Partners
 - ☒ Direct Customers
- ☒ Standard edition
 - ☒ TMC Partners
 - ☒ Direct Customers

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Revision History

Date	Revision Notes/Comments
October 18, 2023	Updated <i>Arranger Experience</i> section.
July 25, 2023	Updated <i>Overview</i> section with note on SAP Concur UI themes; no other changes
February 17, 2023	Added Preferred Name information in <i>Arranger Experience</i> section.
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Travel Arranger View

Section 1: IMPORTANT – About this Guide

Be aware that certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party participants. In some cases, you must contact the vendor/provider directly.

Section 2: Overview

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

Some travelers require assistance with making and managing travel arrangements. Perhaps the traveler is an executive who requires intricate coordination of complicated travel and meeting schedules or perhaps a company prefers that all travel is booked through a specified individual or group.

The person making the travel arrangements on a traveler's behalf is known as a *Travel Arranger*.

Travel Arranger vs Travel Assistant

People who assist travelers are collectively known as arrangers and assistants.

For this guide, they are defined as:

- A *Travel Arranger* can fully manage all aspects of travel (book, cancel, change trips, etc.) as well as travel preferences for another user – using Concur Travel.
- A *Travel Assistant* cannot access any Concur Travel functions or profile for another user. This person's functions involve agency contact, email, etc.

This guide describes the view (page) the Travel Arranger can use to manage travel for one or more travelers in Concur Travel.

Travel Activities Using Travel Arranger View

The Travel Arranger View makes it easier for the arranger to manage those travel activities. The arranger can:

- Book flight, car, hotel, etc.

- View upcoming trips and link to trip actions (change trip, cancel trip, etc.) for a traveler
- View shared trips
- View meeting registrations for a traveler
- View weather forecast details
- View/Filter travelers by name or date of travel
- Create/Edit/Delete public or private notes and tasks for a traveler
- View contact information for a traveler
- View/Change the available picture of a traveler
- Add another Travel Arranger for a traveler
- Discontinue their own arranger association with a traveler
- For users with TripLink, arrangers can forward reservations to plans@tripit.com for the traveler

Assign the Arranger to a Traveler

An arranger can be assigned to a traveler in several ways:

- The traveler can choose an arranger in Profile, as described in *Traveler Experience* in this guide.
- The admin (User Admin in Professional Travel; Admin in Standard Travel) can assign an arranger to a traveler.

The admin searches for the traveler and then clicks the edit icon in the **Profile** column in the search results, locates the **Assistants and Travel Arrangers** section, and assigns an arranger.

- An existing arranger can assign another arranger to a traveler on the **Travel Arranger View** page.

The arranger accesses the traveler's travel preferences (including the **Assistants and Travel Arrangers** section), as described in *Arranger Experience* in this guide.

- Imports:
 - ♦ In Professional Travel, the admin can import travel arrangers using:
 - Import Travel Arrangers (Travel System Admin)
 - Import Data (Travel System Admin, Company Admin)
 - ♦ In Standard Travel, the admin can add arrangers in the setup wizard, using the **Manage Users** step.

Professional and Standard Travel

There are very few differences between Professional and Standard Travel. They are clearly called out in this guide.

Section 3: Traveler Experience

This section describes how the traveler selects the arranger in the **Assistants and Travel Arrangers** section of Profile.

IMPORTANT

INTEGRATED WITH CONCUR REQUEST

If the company has integrated Concur Request with Concur Travel and if the **Enable synchronization of Travel/Request delegates** option is enabled in Request site settings, the **Assistants and Travel Arrangers** section does not appear in the traveler's profile.

The intent is that the company wants to ensure that the Request delegate and the Travel arranger are the same person. If so, the delegate/arranger is defined in Request; there is no option in Travel.

OPTIONAL CONFIGURATION CHOICES

The **Assistants and Travel Arrangers** (Profile) sample below shows all arranger/assistant options. In fact, the company may limit the available options:

- **Hide Add Assistant:** If enabled, the **Add an Assistant** option and the **Refuse Self Assigning Assistants** option are hidden. This setting (module property) allows the company to limit arrangers/assistants to those assigned by the company via import. If the company is interested in using this setting, the company must contact Concur for assistance.



Refer to *Refuse Self Assigning Assistants* in this guide.

- **Limit Self-Assigning Assistant to users within their org unit** (Applies to Professional travel only): The company can set this option in Company Settings (Company Admin) so that the self-assigning assistant and traveler must be in the same org unit.

Use the Assistants and Travel Arrangers Section of Profile

ADD AN ARRANGER/ASSISTANT

The traveler clicks **Profile > Profile Settings > Arrangers/Assistants** (in the **Travel Settings** section of the left menu).

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.		
<input checked="" type="checkbox"/> Refuse Self Assigning Assistants		
Your Assistants and Travel Arrangers		+ Add an Assistant
Brown, Terry L.	Can book travel?	
Dill, Chris	Can book travel?	

In the sample above, Terry Brown is a Travel Arranger (can book travel) and Chris Dill is a Travel Assistant (cannot book travel).

To add an arranger or assistant, the traveler clicks **Add an Assistant**.

Field	Description / Action
Assistant	The traveler types a few letters of the arranger's name. The traveler selects the desired arranger from the search results.
Can book travel for me	The traveler selects (enables) this check box for an arranger or leaves the check box empty for an assistant.
Is my primary assistant for travel	<p>The traveler selects (enables) this check box if desired. Being the primary assistant provides no additional permissions in the user interface; however:</p> <ul style="list-style-type: none"> • It indicates to the agency that if there are issues, the agency should call the primary assistant – not the traveler. • If the profile is configured to sync with the arranger/assistant, then it syncs with the one designated as primary.

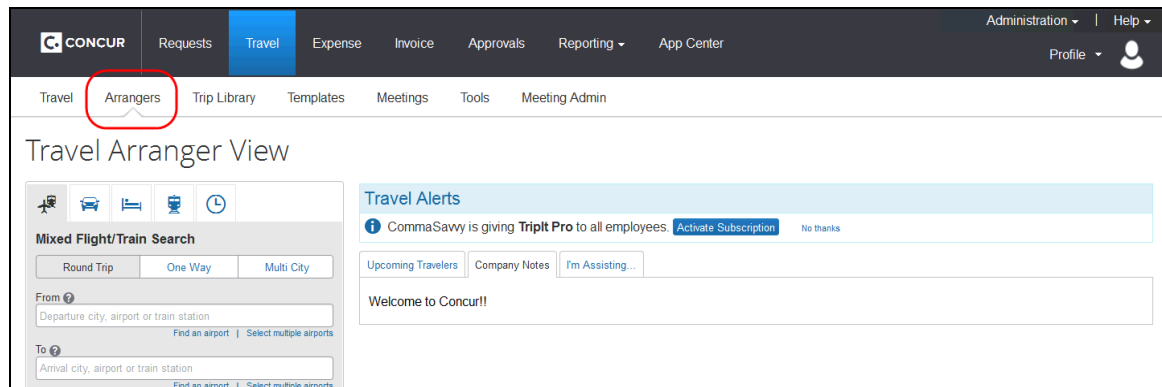
REFUSE SELF ASSIGNING ASSISTANTS

The traveler can select the **Refuse Self Assigning Assistants** check box to better control who can become their arranger/assistant. For example, for privacy concerns, company executives may refuse self-assigning arranger/assistants.

Section 4: Arranger Experience

Manage (Not Book) Travel for a Traveler

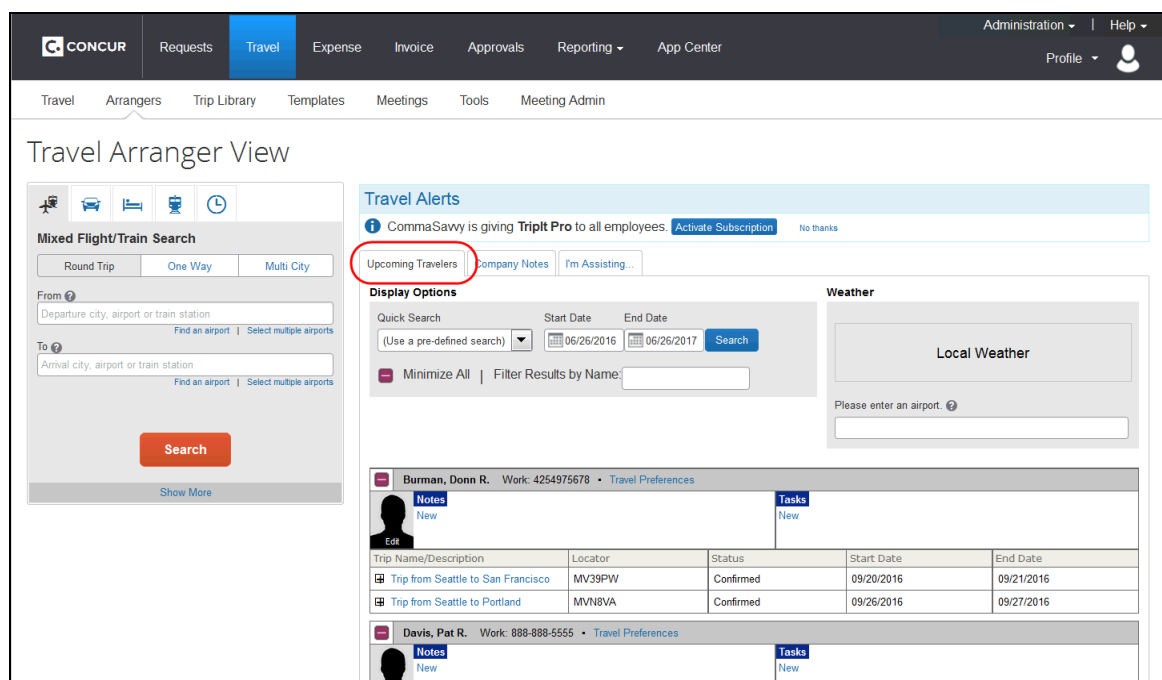
To access the **Travel Arranger View** page, the arranger clicks **Travel > Arrangers** (sub-menu).



NOTE: The arranger can set the Travel Arranger View to be their home page so it appears immediately after the arranger signs in to Concur, as described in *Make the Arranger View the Home Page* in this guide.

Upcoming Travelers Tab

To view and manage traveler activity, the arranger clicks the **Upcoming Travelers** tab.



On the **Upcoming Travelers** tab, the arranger can:

- Search for travelers based on names or travel dates.

- View the traveler's contact number.


Trip Name/Description	Locator
Trip from Seattle to San Francisco	MV39PW

- Click a trip name to access the **Trip Actions** menu to view the itinerary, cancel the trip, etc.
 - ♦ To take an action from the **Trip Actions** menu (for example, **View Itinerary**), click on the actions. A dialog box will appear asking the Arranger to confirm that they are acting on behalf of the Traveler.
 - ♦ Click **Switch** to confirm.

Trip Name/Description	Locator	Status	Start Date	End Date
Trip from Seattle to San Francisco	MV39PW	Confirmed	09/20/2016	09/21/2016
Trip from Seattle to Portland		Confirmed	09/26/2016	09/27/2016

Trip Name/Description	Status	Start Date	End Date
Trip from Seattle to Los Angeles	Confirmed	10/11/2016	10/12/2016

Act as Another User




Act as the following user to perform this action:


Smith, Developer
555-555-5555


Cancel
Switch


- The Profile Dialog updates to indicate that the Arranger is acting as the Traveler (Joe Smith in this case).



Acting as Smith, Joe T

- To switch back to acting as themselves or switch to acting as another traveler, follow the instructions above in the Profile dialog box.


Acting as Smith, Joe T


Smith, Joe T



Act as Another User

Act As 


☒ Myself


☐ A Delegate for another user who has granted you this permission


☐ A Travel Arranger for any user (Self-assign)








Switch


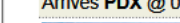
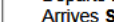
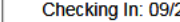

Profile Settings



Sign Out

- Click the  to view the segment information.

Burman, Donn R. Work: 4254975678 • Travel Preferences				
<div>Notes</div> <div>New</div> <div>Edit</div>		<div>Tasks</div> <div>New</div>		
Trip Name/Description	Locator	Status	Start Date	End Date
<div> Trip from Seattle to San Francisco</div> <div> Flight Num: 2329</div> <div>Departs SEA @ 09/20/2016 6:10 AM</div> <div>Arrives PDX @ 09/20/2016 6:56 AM</div> <hr/> <div> Flight Num: 382</div> <div>Departs PDX @ 09/20/2016 10:05 AM</div> <div>Arrives SFO @ 09/20/2016 12:00 PM</div> <hr/> <div> San Mateo Marriott San... (San Mateo)</div> <div>Checking In: 09/20/2016 3:00 PM</div> <div>Checking Out: 09/21/2016 12:00 PM</div> <hr/> <div> Flight Num: 385</div> <div>Departs SFO @ 09/21/2016 1:00 PM</div> <div>Arrives PDX @ 09/21/2016 2:40 PM</div>	MV39PW	Confirmed	09/20/2016	09/21/2016

- Click a flight segment to quickly view TSA wait times, check-in the traveler via the airline's check-in web page, and access information about a particular airport.

Burman, Donn R. Work: 4254975678 • Travel Preferences				
<div>Notes</div> <div>New</div> <div>Edit</div>		<div>Tasks</div> <div>New</div>		
Trip Name/Description	Locator	Status		
<div><input type="checkbox"/> Trip from Seattle to San Francisco</div> <div> Flight Num: 2329</div> <div>Departs SEA @ 09/20/2016 6:10 AM</div> <div>Arrives PDX @ 09/20/2016 6:56 AM</div> <hr/> <div> Flight Num: 382</div> <div>Departs PDX @ 09/20/2016 10:05 AM</div> <div>Arrives SFO @ 09/20/2016 12:00 PM</div> <hr/> <div> San Mateo Ma</div> <div>Checking In: 09/20/2016 3:00 PM</div> <div>Checking Out: 09/21/2016 12:00 PM</div> <hr/> <div> Flight Num: 385</div> <div>Departs SFO @ 09/21/2016 1:00 PM</div> <div>Arrives PDX @ 09/21/2016 2:40 PM</div>	MV39PW	Confirmed	09/21/2016	

 Flight Num: 2329

Check-in

View TSA Security Wait Times

Go to SEA's web site

Go to PDX's web site

- Click a hotel segment to access the hotel's web site.

- Click **Travel Preferences** to view a summary of the traveler's travel preferences.

Upcoming Travelers | Company Notes | I'm Assisting...

Display Options

Quick Search: (Use a pre-defined search) Start Date: 06/26/2016 End Date: 06/26/2017 Search

Minimize All | Filter Results by Name:

Travel Preferences - Burman, Donn R.

Air Travel Preferences
 Seat: Don't Care
 Row: Don't Care
 Special Meals: Regular Meal
 Ticket Delivery: E-ticket when possible
 Preferred Departure Airport:
 Other Air Travel Preferences:

Hotel Preferences
 Room Type: Don't Care
 Smoking Preference: Non-smoking
 I prefer hotel that has:
 Other Hotel Preferences:

Car Rental Preferences
 Car Type: Any Car Class
 Smoking Preference: Don't Care
 Car Transmission: Don't Care
 Other Car Preferences:

Frequent-Traveler Programs
 American Airlines (AA Advantage) 9928283736
 Enterprise 1233456798
 Marriott (All) (Marriott Rewards) 82723646482

Trip Name/Description	Locator	Status	Start Date	End Date
Trip from Seattle to San Francisco	MV39PW	Confirmed		
Trip from Seattle to Portland	MVN8VA	Confirmed		

- Click **Edit** at the bottom of the **Travel Preferences** box to edit the preferences in Profile, including the **Assistants and Travel Arrangers** section to add another Travel Arranger for the traveler.

Travel Preferences Go to top

Eligible for the following discount travel rates/fare classes
☐ AAA/CAA ☐ Government ☐ Military ☐ Senior/AARP

Air Travel Preferences

Seat: Don't Care Seat Section: Don't Care Special Meals: Regular Meal Ticket Delivery: E-ticket when possible
 Preferred Departure Airport: Other Air Travel Preferences: Medical Alerts:

Rail Travel Preferences

This is a sample of CUSTOM TEXT: Rail Travel Preferences

Seat: Don't Care Coach: Don't Care Noise Comfort: Don't Care

Other Rail Preferences
 The following preferences may not be supported by all rail systems.
 Bed: Don't Care Bed Category: Don't Care Berth: Don't Care Deck: Don't Care Space Type: Don't Care Fare Space Comfort: Don't Care Special Meals: Don't Care
 Contingencies: Ticket Delivery:

- Enter notes and tasks as reminders for the arranger. The arranger selects the **Private** check box to prevent any other arranger from seeing them.

Notes **Tasks**

Save Cancel ☒ Private Save Cancel ☒ Private

Trip Name/Description	Locator	Status	Start Date	End Date
Trip from Seattle to San Francisco	MV39PW	Confirmed	09/20/2016	09/21/2016

I'm Assisting Tab

The arranger clicks the **I'm Assisting** tab and can:

Upcoming Travelers	Company Notes	I'm Assisting...	
Burman, Donn R.	Work: 4254975678	Can book travel? ✓	🗑️
Davis, Pat R.	Work: 888-888-5555	Can book travel? ✓	🗑️

- Click the icon in the right-most column to discontinue the arranger association.
- Click the traveler's name to edit the traveler's travel preferences in Profile, including the **Assistants and Travel Arrangers** section to add another Travel Arranger for the traveler.

Preferred Name

Preferred name is enabled through **My Profile > Personal Information**.

My Profile - Personal Information

Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator.

Fields marked **[Required]** and **[Required**]** (validated and required) must be completed to save your profile.

Title	First Name	Middle Name	Preferred Name	Last Name	Suffix
▼	Josafina		Josi	Common	▼

When this field is enabled, a user's preferred name appears in the **Travel Arranger View**.

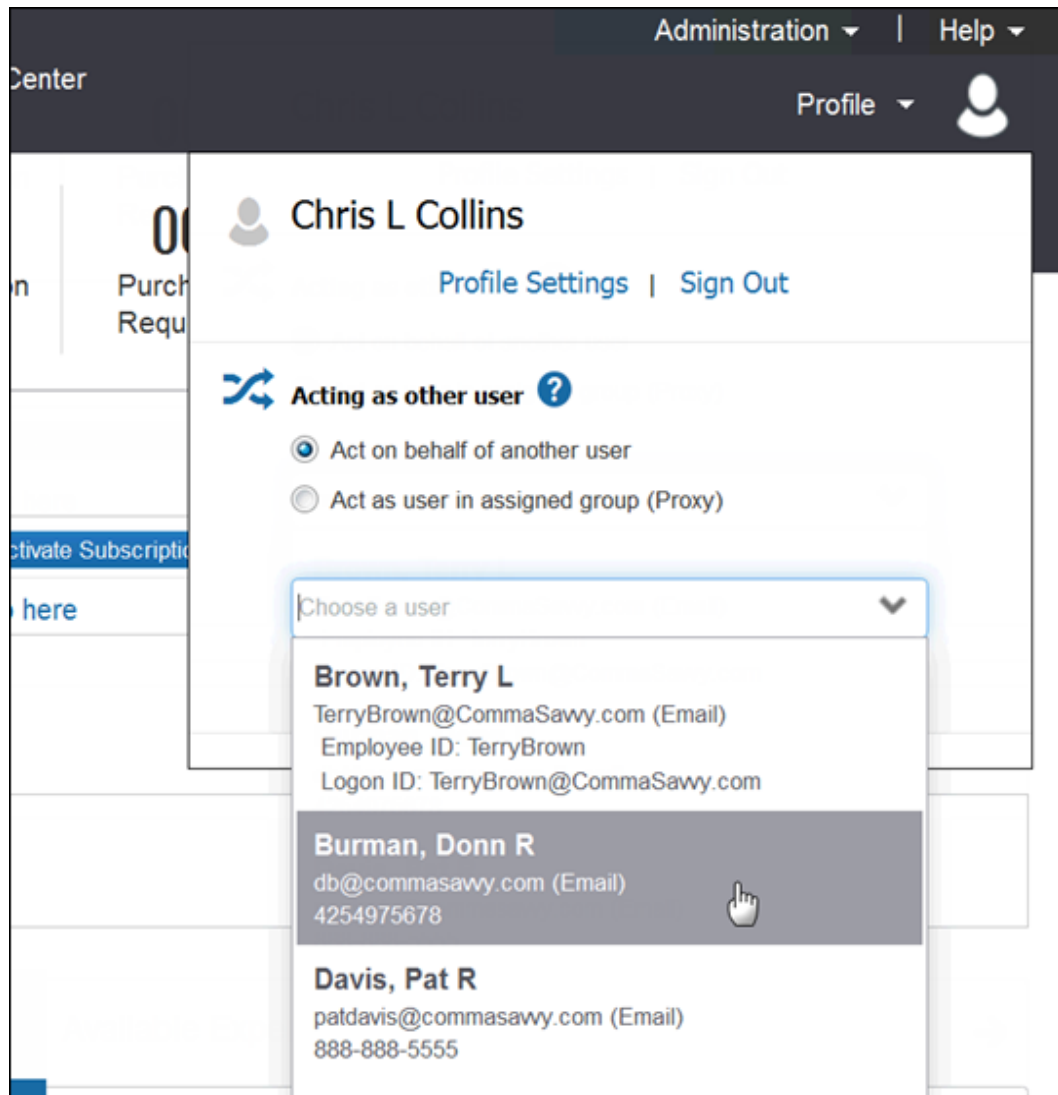
Upcoming Travelers	Manifests	Company Notes	I'm Assisting...
Csontos, Andy	Work: 703.837.6100	Can book travel?	
LEE, Anthony L.	Work: 703-837-6100	Can book travel?	

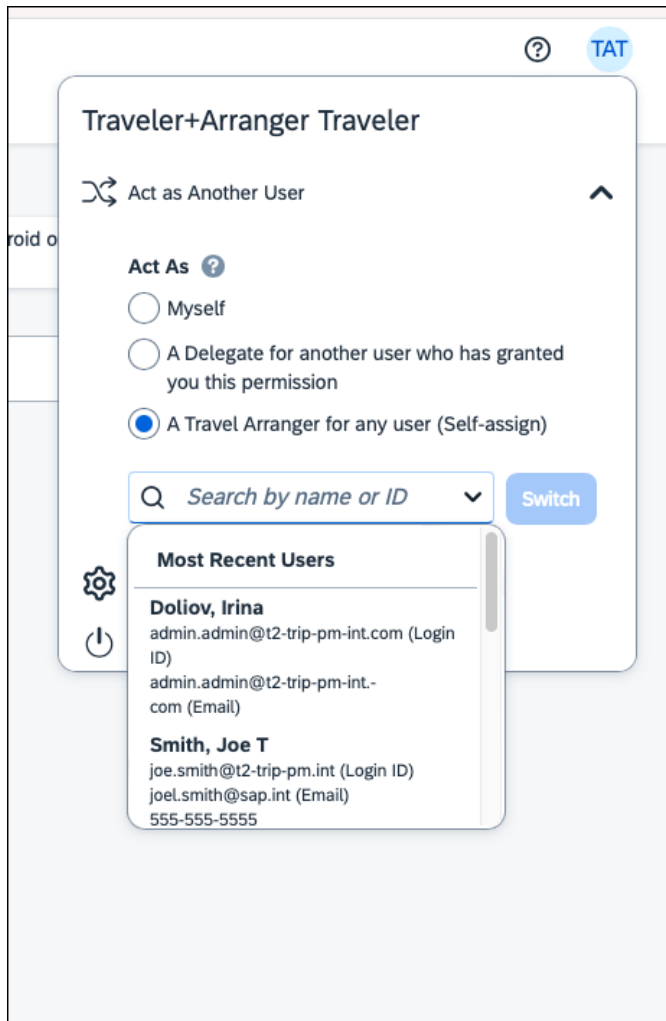
Book Travel for a Traveler

! **IMPORTANT:** Note that when the arranger books for a traveler, there will be differences based on the page the arranger is on when selecting the traveler. In the example below, the assumption is that the arranger is starting on the **Travel Arranger View** page. Additional information is provided in the *IMPORTANT: Difference in Arranger Experience* section below.

Select a Traveler

While on the **Travel Arranger View** page, the arranger clicks **Profile**.

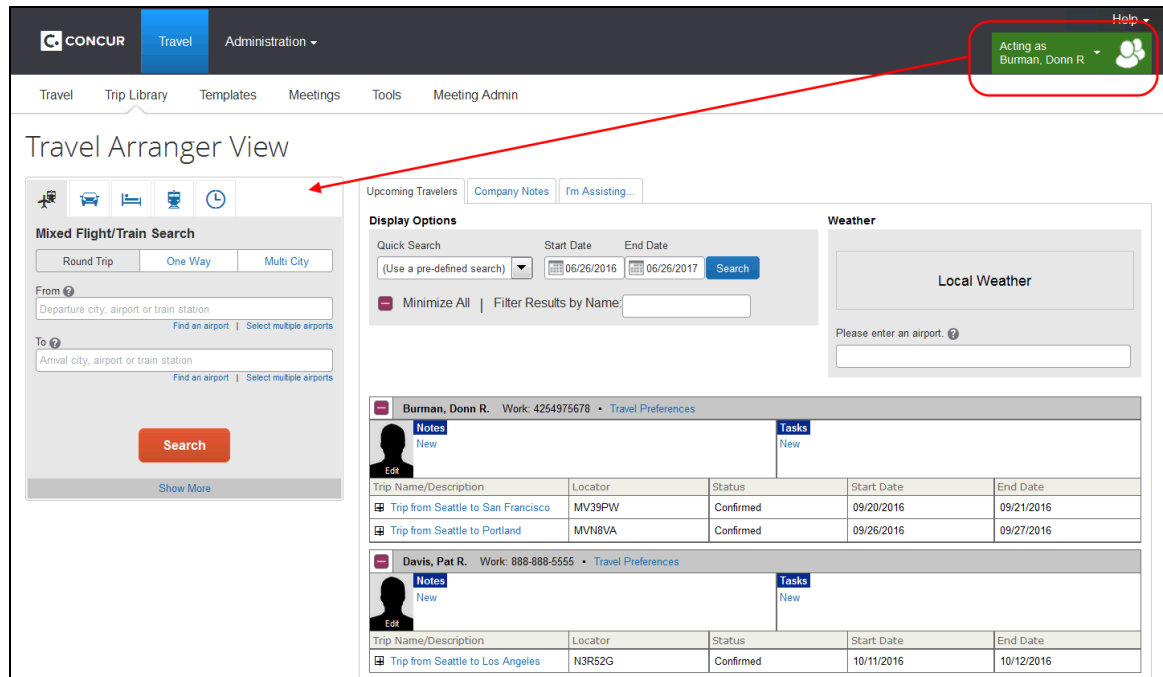




Then:

- The arranger ensures that **Act As** is selected.
- The arranger clicks the text field. A list appears. The arranger clicks the desired name.
- Select **Switch** to ensure that the arranger is acting on behalf of another user.

The traveler's name now appears in the upper-right corner. When the arranger books travel, ***the arranger is now booking for that traveler.***



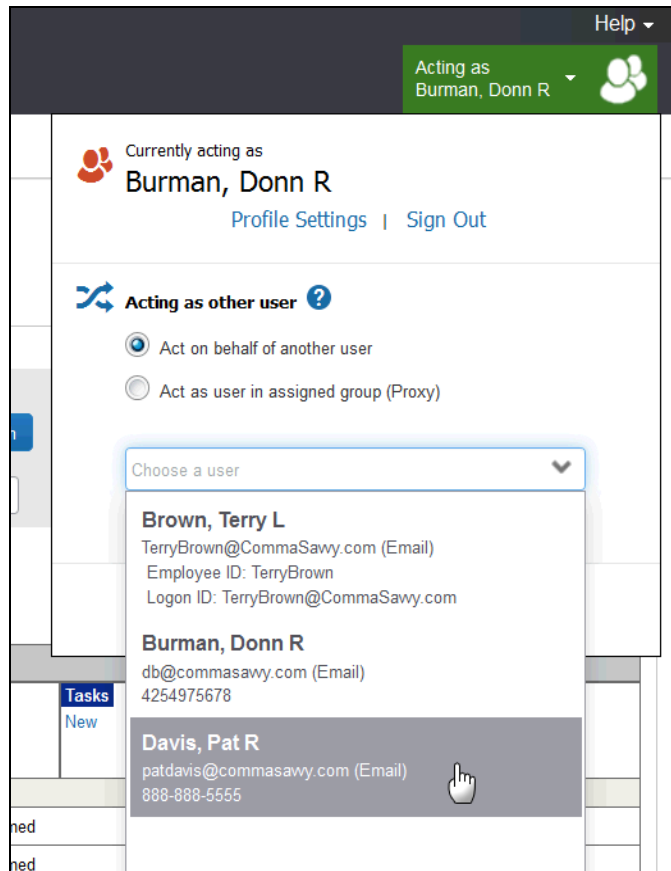
NOTE: Be aware that there is no relationship between the travelers that currently appear on the **Upcoming Travelers** tab and the traveler the arranger is booking for right now. ***The traveler whose name appears in the upper-right corner is the affected traveler.***

The arranger books the trip as usual. When done, the trip appears on the **Upcoming Travelers** tab for the associated traveler.

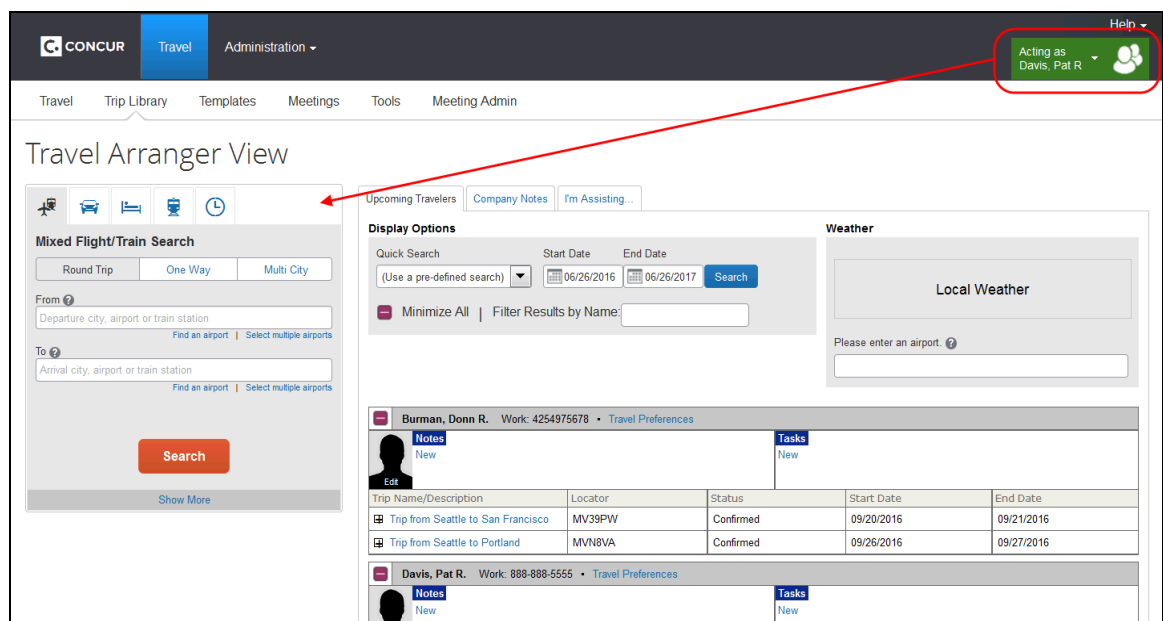
Switch Travelers

To switch to a different traveler (in this case, from Donn Burman to Pat Davis), the arranger clicks **Profile**.

Donn Burman still appears at the top of the page. The arranger clicks the text field and selects the new traveler (Pat Davis).

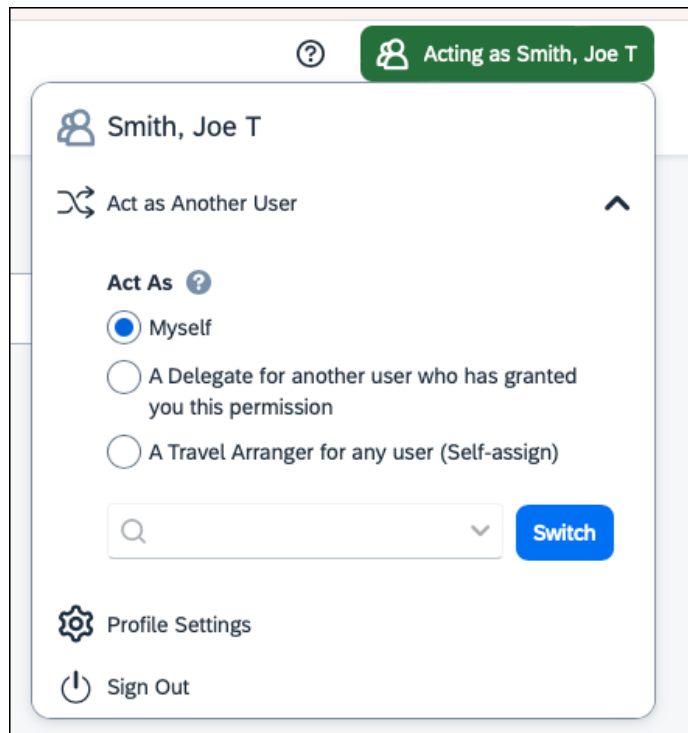


The arranger clicks **Switch** (not shown here). Pat Davis now appears in the upper-right corner and the arranger can now book travel for Pat.



Stop Booking for Travelers

When ready to stop booking for other travelers, the arranger clicks **Profile > "Act As" > Myself...** and then click **Switch**.



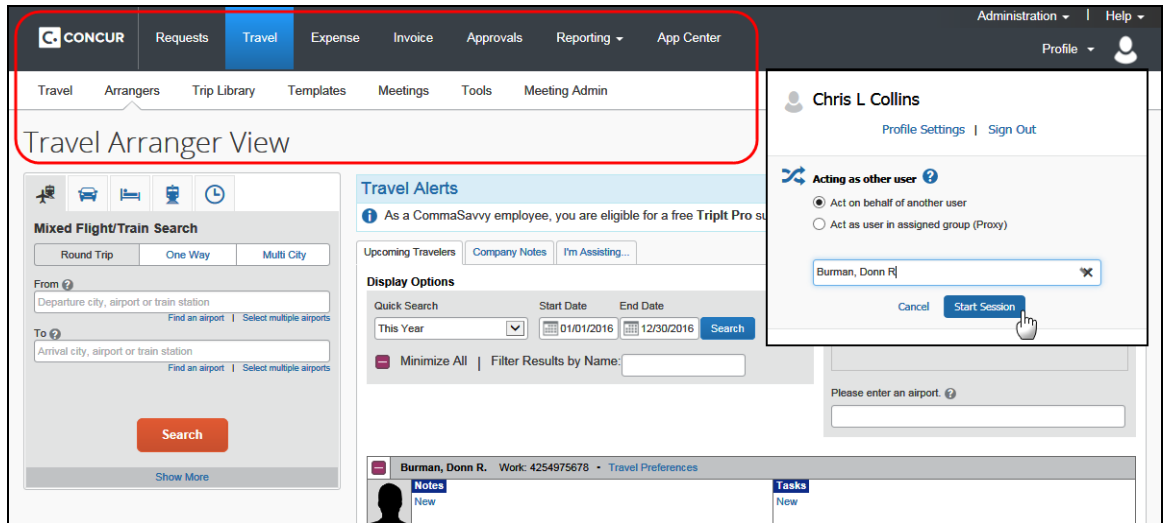
IMPORTANT: Difference in Arranger Experience

As mentioned earlier, there will be a difference in what the arranger sees based on the page the arranger is on when they select a traveler. All tasks can still be completed but the process may change slightly.

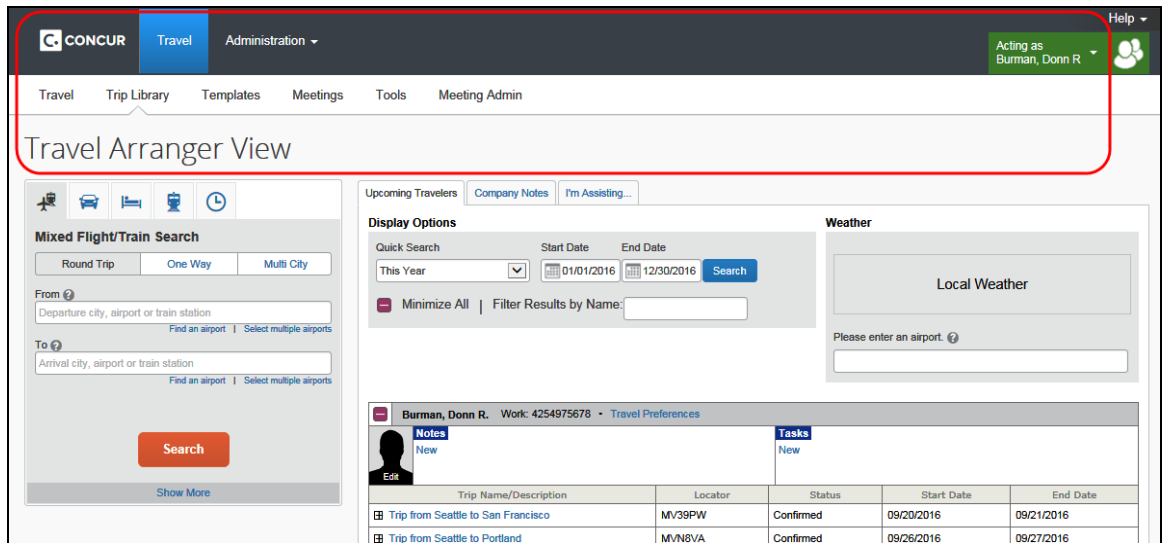
This situation is part of the design because the arranger may also be an Expense delegate and the ability to navigate the various pages is imperative.

Start on the Travel Arranger View Page

Assume in this sample, the arranger (Chris Collins) is on the **Travel Arranger View** page. The menu reflects all of the arranger's (Chris Collins) permissions, including **Travel > Arrangers**.



He then selects a traveler (Donn Burman) and clicks **Start Session**.

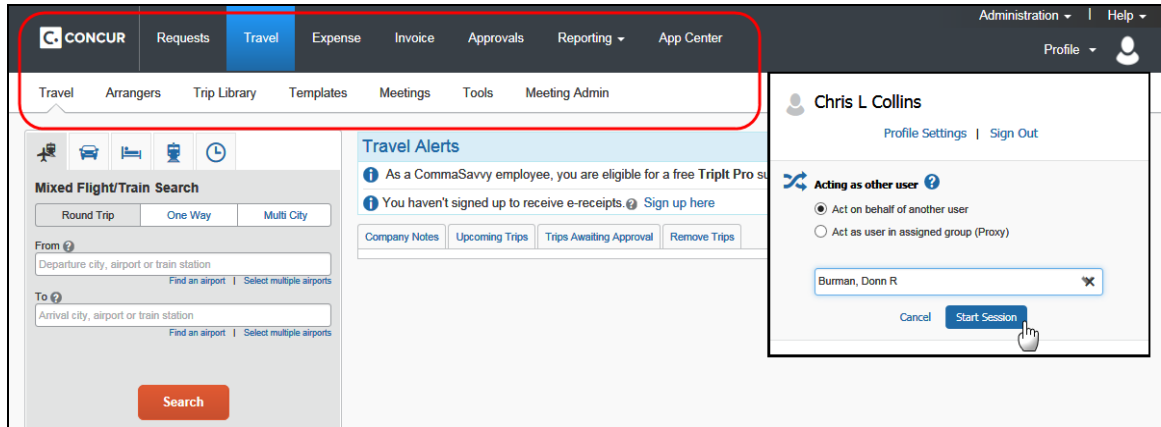


Now:

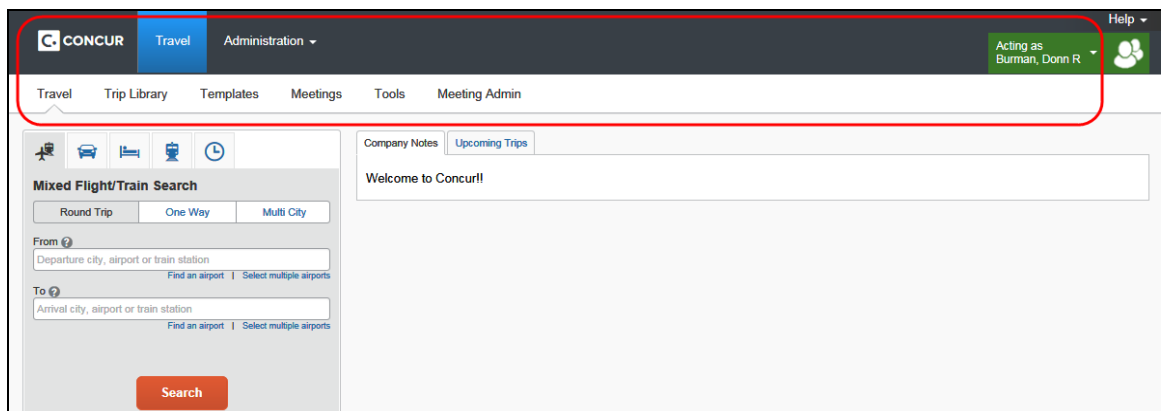
- The traveler's name (Donn Burman) appears in the upper-right corner.
- The menu options now reflect the traveler's (Donn Burman) permissions – not the arranger's (Chris Collins) permissions.
- The arranger view is still available:
 - ♦ The arranger can complete all arranger tasks for all travelers but can book travel **only** for the selected traveler (Donn Burman).
 - ♦ The **Arrangers** menu option is not available because the menu reflects the traveler's (Donn Burman) permissions. If the arranger leaves this page (for example, to edit a traveler's preferences), the arranger cannot automatically return to this page. The arranger must click **Profile > Done acting for others** in order to access the **Travel Arranger View** page.

Start on Any Page Other Than the Travel Arranger View Page

Assume in this sample, the arranger (Chris Collins) is on the Travel home page. The menu reflects all of the arranger's (Chris Collins) permissions, including **Travel > Arrangers**.



He then selects a traveler (Donn Burman) and clicks **Start Session**.



Now:

- The traveler's name (Donn Burman) appears in the upper-right corner.
- The menu options now reflect the traveler's (Donn Burman) permissions – not the arranger's (Chris Collins) permissions.
- The arranger view is not available.

Make the Arranger View the Home Page – Profile

The arranger can set the **Travel Arranger View** page to be the home page – instead of the Concur home page – so that it appears immediately after the arranger signs in.

The user clicks **Profile > Profile Settings > System Settings** (in the **Other Settings** section of the left menu). In the **Other Preferences** section of the page, the user selects *Travel Arranger View* in the **Home Page** list.

The screenshot displays the 'System Settings' interface. It is divided into four main sections: 'Regional Settings and Language', 'Calendar Settings', 'Other Preferences', and 'Other Settings'. In the 'Other Preferences' section, the 'Home Page' dropdown menu is open, showing two options: 'Request Processor' and 'Travel Arranger View'. A mouse cursor is pointing at 'Travel Arranger View', which is highlighted. The 'Regional Settings' section includes fields for Default Language (English (United States)), Number Format (1,000.00), Placement of Currency Symbol (Before the amount), Negative Number Format (-100), Negative Currency Format (-100), mile/km (mile), Date Format (mm/dd/yyyy), Time Format (h:mm AM/PM), Hour/Minute Separator (:), and Time zone (local time) (UTC-05:00 Eastern Time (US & Canada)). The 'Calendar Settings' section includes Start week on (Sunday), Start Day View At (08:00 am), End Day View At (08:00 pm), and Default View (month). The 'Other Settings' section includes a checkbox for 'Run in Concur Accessibility Mode'.

If, in the future, the user wants to return to the Concur home page as the default home page, the user selects the blank option in the **Home Page** list.

Section 5: Configuration

There are no configuration steps. This feature is automatically available for all users who are designated as Travel Arrangers (can book travel) in Profile, as described in *Traveler Experience* in this guide.

