

How to Assist or Arrange a Trip

Statewide Travel Program

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1. General Information

What does “assist or arrange a trip” mean?

In Concur and within this document, “Assist” and “Arrange” mean the same thing. In Concur, arranging a trip means one person books a trip for another agency traveler.

Who can assist or arrange a trip?

Arranging a trip is a Concur functionality for any agency employee with a Concur profile.

This feature is often used by Travel Coordinators for their agency's travelers; however, it can be used by any employee who books travel for others.

How do I obtain assisting/arranging permissions?

Arrangers must have their own Concur profile. See the video and/or guide ‘How Does a Traveler Request Access to Concur’ for more information.

Arrangers need to have the correct permissions assigned to book for others. See the video and/or guide ‘How to Add and Remove a Travel Arranger/Assistant’ for more information.

Whose trips can I assist/arrange?

Arrangers can arrange a trip for any agency traveler with a Concur profile.

If you would like to book for non-employees who are traveling on behalf of the agency, see the video and/or guide ‘How to Book for a Guest’ for more information.

2. How to Arrange a Trip

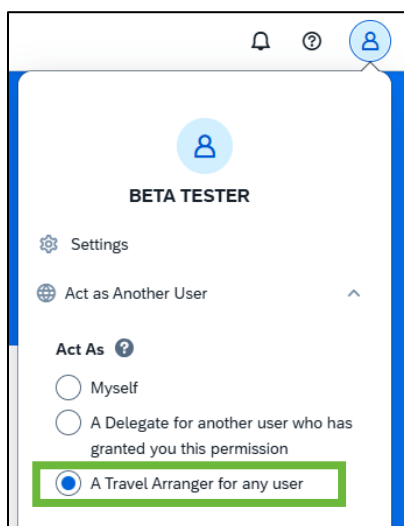
2.1 Switch Accounts

Log into your Concur account. See the video and/or guide 'How to Log into Concur' for more information.

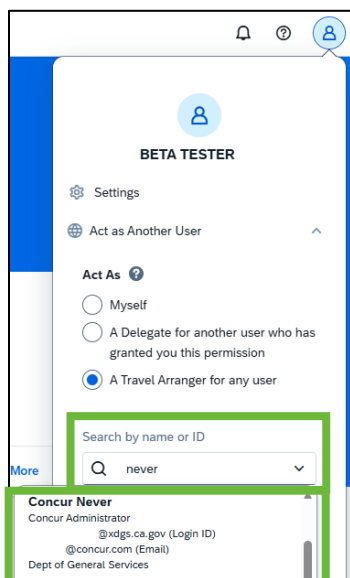
Click the blue circle in the upper right corner.



In the pop-up, select "Act as Another User" and "A Travel Arranger for any user."



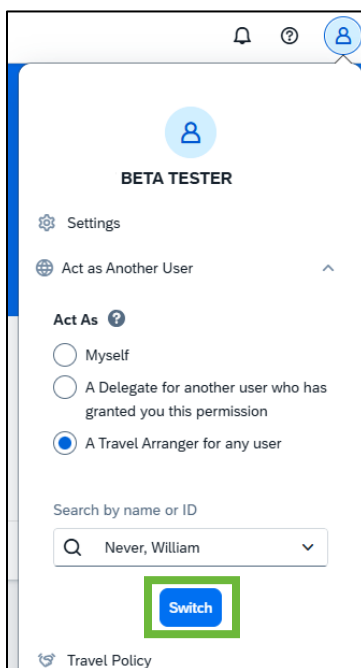
In the search bar, type the traveler's name. As you type, the drop down will auto-populate with Concur users who have granted you Travel Arranging permissions.



If the person for whom you are booking travel for does not show up, there are two situations to investigate:

- A. You are not assigned as a Travel Assistant/Arranger for their profile. See the video and/or guide 'How to Add and Remove a Travel Arranger/Assistant' for more information.
- B. The traveler you are booking travel for does not have a Concur profile. Reach out to your agency Travel Coordinator(s) for assistance.

Choose the correct user from the drop-down menu and click the 'Switch' button.



The screen will reload. The green box with the traveler's name in the upper right-hand corner signifies you are acting as another user.



2.2 Book Travel

From there, you can book flights, train fares, rental cars, and/or hotel stays for the traveler. For more information on how to book travel, please see the videos and/or guides 'How to Book Air,' 'How to Book a Rental Car,' 'How to Book Lodging,' and/or 'How to Book a Train' for more information.

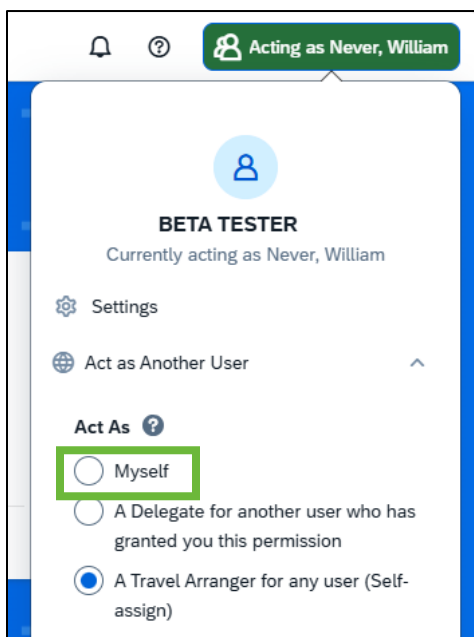
Note: You will receive email notifications for all travelers for whom you are listed as a primary Travel Arranger/Assistant. To remove yourself as a primary Travel Arranger, see the video and/or guide 'How to Add and Remove a Travel Arranger/Assistant' for more information.

2.3 Switch Back to Your Account

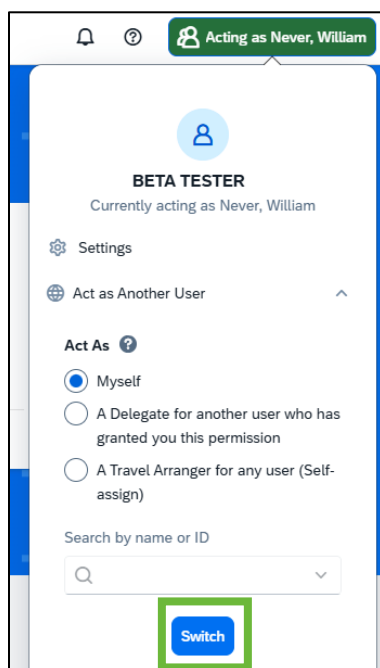
Once you are done booking for this traveler, click on the green box with the traveler's name in the upper right corner.



Under "Act As," select "Myself."



Click the "Switch" button.



HOW TO ASSIST OR ARRANGE A TRIP

The page will reload. The blue icon in the upper right-hand corner signifies you are back to your own profile.



3. Additional Resources

As a traveler, your first resource for all travel-related inquiries is your agency Travel Coordinator(s). Other helpful resources are:

3.1 CI Azumano

Email: CalTravel@ciazumano.com

Travel Agents: (877) 454-8785 (use only if trip is in progress)

- [CI Azumano Travel Tools and Resources](#)
- [CI Azumano Webpage](#)
- [Concur Login Page](#)

3.2 Statewide Travel Program

Email: StatewideTravelProgram@dgs.ca.gov

Find the following videos and guides on the [Statewide Travel Program Training Resources Page](#):

- How Does a Traveler Request Access to Concur?
- How to Add and Remove a Travel Arranger/Assistant
- How to Book a Rental Car
- How to Book a Train
- How to Book Air
- How to Book for a Guest
- How to Book Lodging
- How to Log into Concur