

How to Assist/Arrange a Trip

Statewide Travel Program

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1. General Information

1.1 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 you book a trip for a different person.

1.2 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.

1.3 How Do I Get Assisting/Arranging Permissions?

Arrangers must have their own Concur profile. See ‘How Does a Traveler Request Access to Concur’ for information on getting a profile.

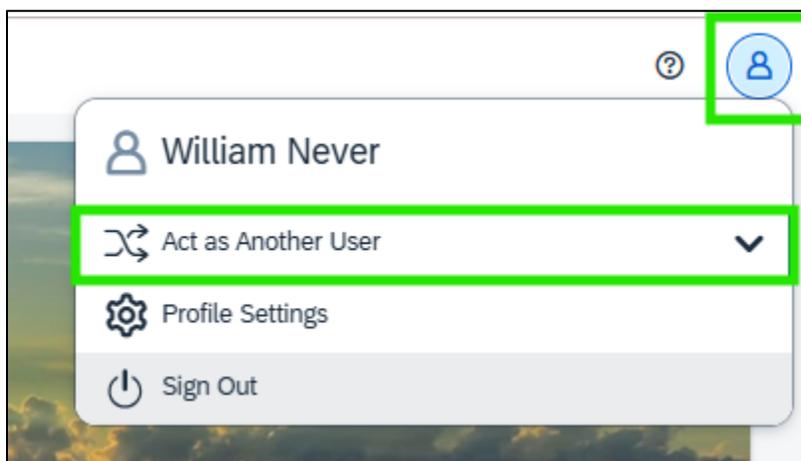
Arrangers need to have the correct permissions assigned to book for others. See ‘Assigning a Travel Arranger/Assistant’ for instructions on how to become a travel Arranger/Assistant.

2. Step-by-step Instructions

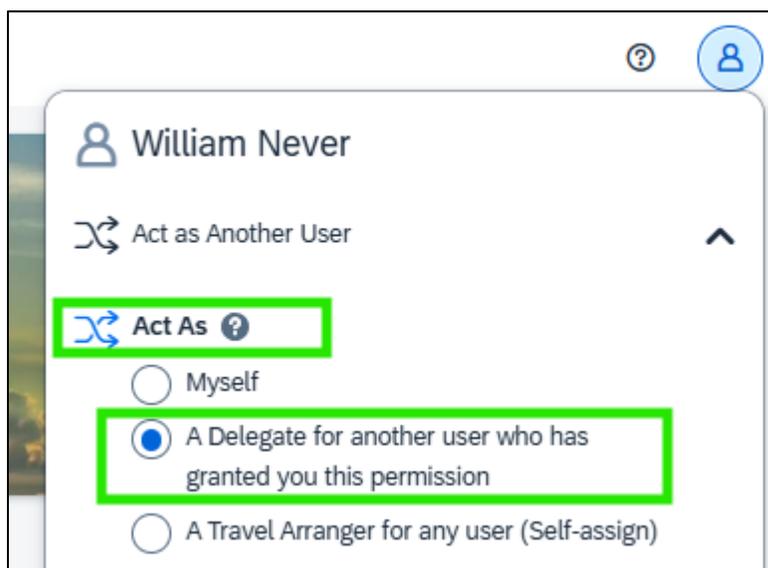
2.1 How to Arrange a Trip

Log into Concur under your account. See 'Logging Into Concur' for more information.

Click the blue circle in the upper right corner and choose 'Act as another user.'

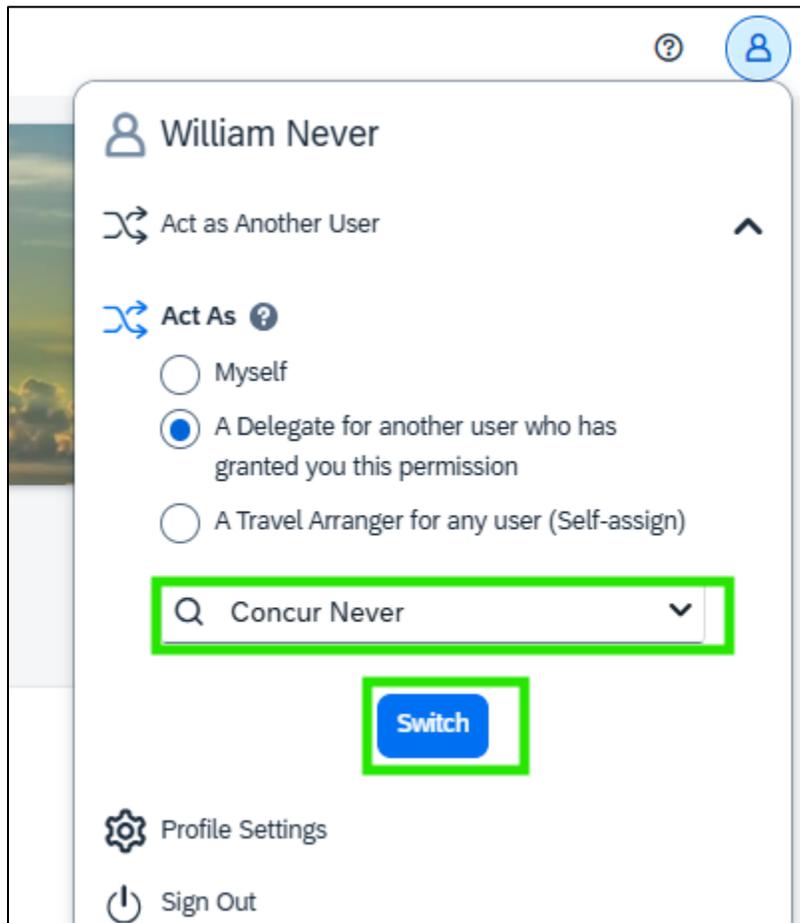


Under 'Act As,' click 'A Delegate for another user who has granted you this permission.'

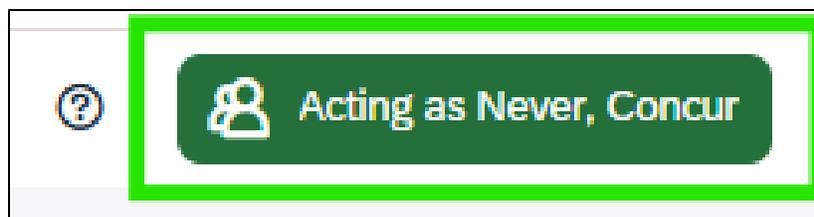


Type the traveler's name. As you type, the drop down will auto-populate with Concur users who have granted you Travel Arranging permissions. If the person whom you are booking travel for does not show up, you are not assigned as a travel Assistant/Arranger for their profile. See 'Assigning a Travel Arranger/Assistant' for instructions on how to remedy this.

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

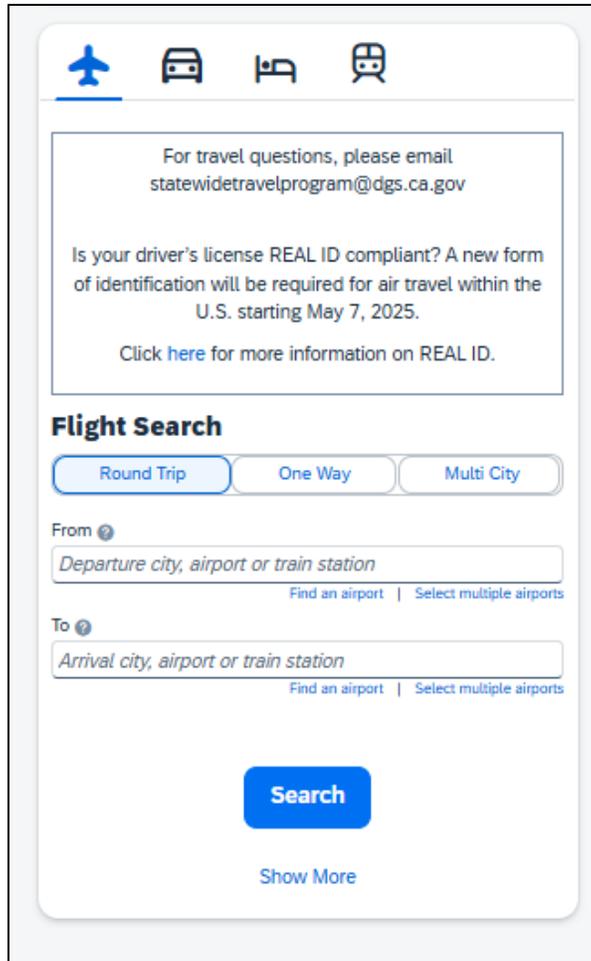


The screen will reload. The green icon in the upper right-hand corner signifies you are acting as another user.



HOW TO ASSIST/ARRANGE A TRIP

From there, you can book flights, trains, car rentals, and hotel stays for someone else. For more information on how to book travel, please see 'How to Book Air,' 'How to Book a Car Rental,' 'How to Book a Hotel,' and/or 'How to Book a Train.'

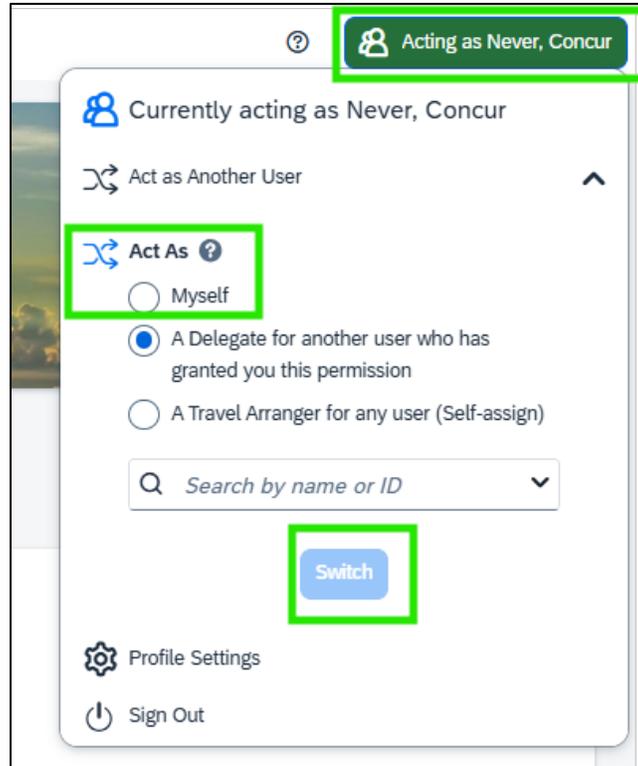


The screenshot displays a travel booking interface. At the top, there are four icons: an airplane, a car, a bed, and a train. Below these icons is a text box with the following content: "For travel questions, please email statewidetravelprogram@dgs.ca.gov". Below this is another text box: "Is your driver's license REAL ID compliant? A new form of identification will be required for air travel within the U.S. starting May 7, 2025. Click [here](#) for more information on REAL ID." Below the text boxes is a "Flight Search" section. It features three buttons: "Round Trip" (selected), "One Way", and "Multi City". Below the buttons are two input fields: "From" and "To". The "From" field has a placeholder "Departure city, airport or train station" and a link "Find an airport | Select multiple airports". The "To" field has a placeholder "Arrival city, airport or train station" and a link "Find an airport | Select multiple airports". Below the input fields is a blue "Search" button and a "Show More" link.

Please note that you will receive email notifications for all travelers for whom you are listed as a primary Travel Arranger/Assistant. To remove yourself as a travel Arranger, please see 'How to Remove an Assistant.'

2.2 How to Return to Your Profile

Once you are done booking for this traveler, click on the green icon at the upper right corner. Under 'Act as,' choose 'Myself' and click 'Switch.'



Once the icon is blue, it signifies you are acting as yourself.



3. Additional Resources

3.1 General Resources

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

- [Statewide Travel Program Trainings Resource Page](#)
- [CI Azumano Webpage](#)
- [Concur Login Page](#)

3.2 Relevant Resources

- [Assigning a Travel Arranger/Assistant](#)
- [Assigning a Travel Arranger/Assistant \(Video\)](#)
- [How to Assist or Arrange a Trip \(Video\)](#)
- [How to Remove an Assistant \(Video\)](#)
- [How to Book a Car Rental \(Video\)](#)
- [How to Book Air \(Video\)](#)
- [Logging Into Concur](#)
- [Logging Into Concur \(Video\)](#)
- [How Does a Traveler Request Access to Concur?](#)
- [How Does a Traveler Request Access to Concur? \(Video\)](#)