

Concur Travel Arranger Quick Start Guide

Concur Travel Arranger Role – An Introduction

The Concur Travel Arranger role allows a Concur user to arrange travel for other Concur user(s) to whom they are assigned. An Arranger must have an active Concur account. The role provides the ability to:

- Manage travel activities (book, check-in, cancel, change, etc.) for all areas of travel (air, hotel, etc.) on behalf of one or more other Concur users
- View and manage itineraries and view TSA and airline status updates for travelers to whom they are assigned
- Assign other Concur users as travel arrangers to a traveler
- Discontinue their own travel arranger relationships

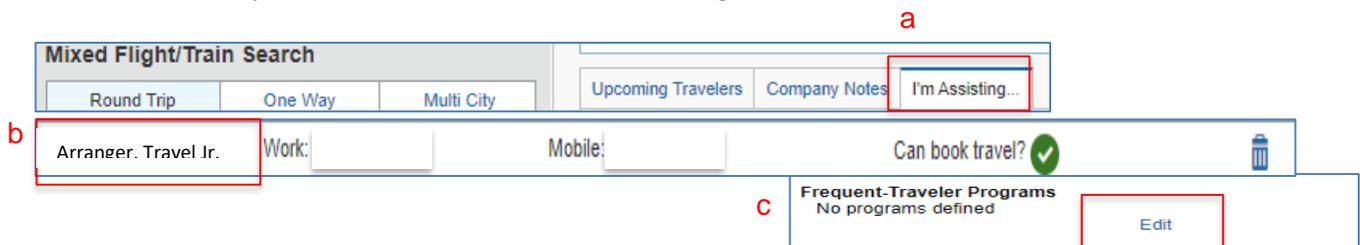
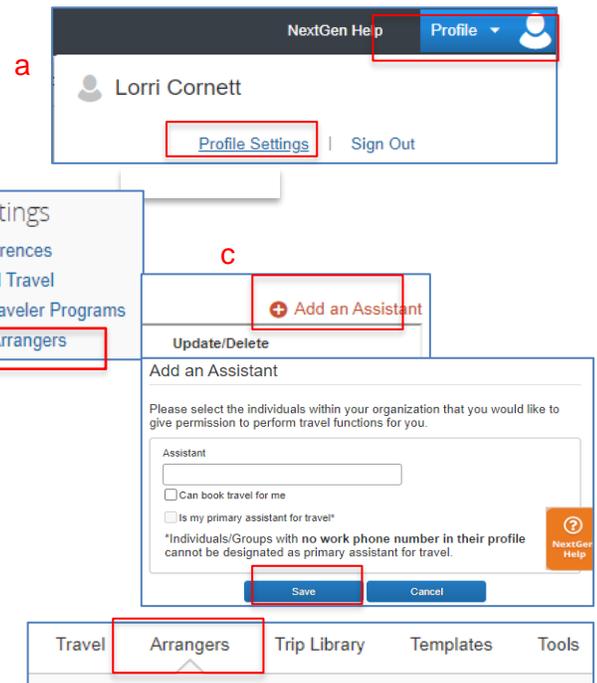
Assigning a Travel Arranger

An Arranger can be assigned in one of the following ways:

1. A traveler can assign a Concur user to the arranger role from their Concur Travel page:
 - a. Click 'Profile' and then 'Profile Settings.'
 - b. Click 'Assistants/Arrangers' in the Travel Settings section.
 - c. Click 'Add an Assistant', enter the name, select permission details and click 'Save.'
 - d. Once a Concur user is granted permission by the method above, that user will have a Travel Arranger View within their Concur account and can perform the functions in #2, below.

NOTE: A Concur Administrator can also assign an arranger to a traveler.

2. An Arranger can now self-assign to other travelers and can assign other Concur users as an Arranger to a traveler:
 - a. Click the 'I'm Assisting...' tab in the Travel Arranger View.
 - b. Click a name to select an existing arranger.
 - c. To add a new arranger from this screen, select an existing name and click 'Edit' in the pop-up window.
 - d. Follow the steps in the section above to add an Arranger.



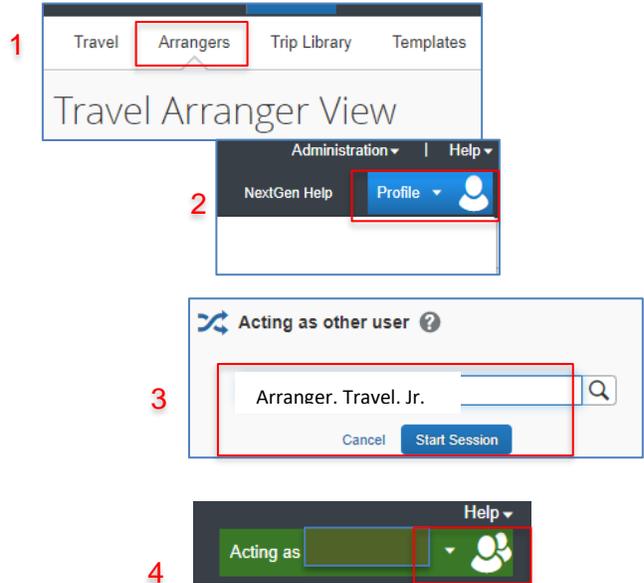
Acting as a Travel Arranger

To begin an initial session as an Arranger for a traveler - after being assigned by a traveler or by another Arranger - the user will log out of any existing Concur sessions and log back in. Follow the steps below to enter and exit an Arranger session.

The Concur home screen of a travel arranger includes an ‘Arrangers’ tab, from which all actions related to managing travel and traveler profiles can be initiated while in the ‘Acting as...’ session.

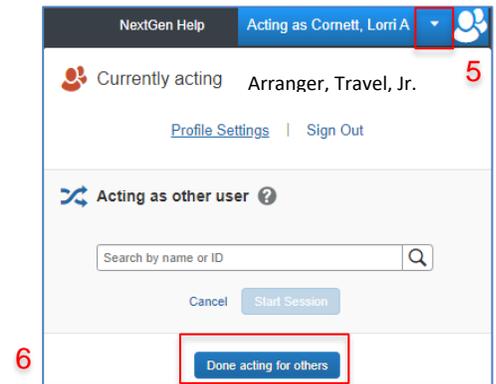
To begin an Arranger session:

1. Click the ‘Arrangers’ tab at the top of the screen.
2. Click the ‘Profile’ button.
3. Click or enter the name of the traveler in the ‘Acting as other user’ box and click ‘Start Session.’
4. The Profile button will change to a green box with ‘Acting as [Name]’ and will show a double-user icon.



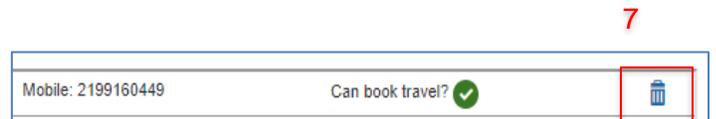
To end an Arranger session:

5. Click the “Acting as [Name] drop-down arrow in the green box at the top of the page (as in 2., above). The box will return to blue.
6. Click the ‘Done acting for others’ button. This will return the view to the Travel Arranger View tab.



Discontinuing an Arranger Relationship

7. An Arranger can discontinue an Arranger relationship by clicking the ‘I’m Assisting...’ tab in the Travel Arrangers View and clicking the trash can icon to the far right of the individual Arranger entry.



Travel Program Resources

World Travel Inc. / Concur Travel	IEEE
<p>Concur Travel Online Booking Tool: Technical Support <i>(via World Travel)</i></p> <p>Chat Option: Click in the center box on the “Company Notes” tab of the Concur Travel homepage</p> <p>Phone: + 1 800 221 4730 Email: Onlinehelp@worldtravelinc.com</p>	<p><u>IEEE Travel Program Page</u> <i>For a full overview of the travel program and its resources, including:</i></p> <ul style="list-style-type: none"> • Concur Travel FAQs • Concur Travel Quick Reference Guide - Employee • Concur Travel Quick Reference Guide – Volunteer/Member • Travel Arranger Quick Reference Guide
<p>World Travel – Booking Agents & Emergency Support (24/7)</p> <p>+1 800 879 4333 (US & Canada) +1 717 556 1100 (Elsewhere)</p> <p>IEEE Account Pseudo Code 2UØF <i>(if requested)</i></p>	<p>IEEE Travel Program Operations</p> <p>Sherry Russ Sills, Director, Event Operations IEEE Meetings, Conferences, & Events (MCE)</p> <p>+1 732 562 3980 Email: mce-services@ieee.org</p>
<p>Online Resources <i>For videos, PDFs, webinars and more</i></p> <p>Concur & World Travel Self-Service Dashboard</p> <p>Training Webinar Registration <i>(ongoing schedule)</i></p> <ul style="list-style-type: none"> • Generic Travel Review • Tips & Tricks 	<p>IEEE NextGen Expense Reimbursement (Concur) General Inquiries:</p> <p>Email: nextgenexpense@ieee.org</p>