How to Book as a Travel Arranger/Assistant

Help! I need to book travel for another Concur user. How do I do that?

You will use this procedure when you are booking on behalf of another Concur user.

This is not the procedure to follow if you are booking for a guest (someone without a Concur logon).

Note: You can self-assign as a travel arranger/assistant for another employee. This gives you the rights to book travel (under the Travel header in Concur) but nothing else. To book travel on behalf of another Concur user, you must also be their delegate. Being a delegate gives you the permissions to see the Request. The user must login to Concur and give you the permission to be their delegate.

Login to Concur as yourself. Click on your name, and select “Act on behalf of another user”. Enter the employee’s last name, followed by their first name, or enter their EMPLID. Click on the user’s name, and then select Start Session.

Booking for another employee should always begin from the approved request. Navigate to Requests, then to Manage Requests.

An approved request, with option 1 or 3 selected on the request header for “How will you be booking your Travel?” will have a book link beside the request.

Click on the Book link.
You will be defaulted into the airline. Enter your search criteria for the flight you need.
On the right side of the screen, you will see the available flights for the time frame specified. Click on **Flight Details** for additional information.

3. **Select** Flights available within our travel policy (lowest price).

4. **Select** Flights outside our travel policy. These flights can be selected but require an exception reason.

Due to Southwest’s integration with Concur, Blue View fares buttons will be displayed initially. Green and Yellow Select buttons will be displayed after the View fares button is clicked.

Review the flight availability and select a flight by clicking on **Select**.
If you select a button you will receive a Travel Policy Violation message. Select from the drop down box your reason for selecting a flight that is outside our travel policy.

![Travel Policy Violation]

Review the flight details and traveler information.

If this is the flight you wish to book, you may select your seat assignment at this time by clicking on

![Select Seats]

**Note:** Southwest does not have an option for selecting seats.

Click the seat you wish to select and then click **Select Seat**.

Click **Close**.

Assign your seats for all legs of your trip.

Review the method of payment and make any necessary changes. (Method of payment should be your University travel card.)

On the **Review and Reserve Flight** page, verify all information and select

![Reserve Flight and Continue]
On the **Travel Details** page, review the details of your reservation and the **Total Estimated Cost** and then click **Next**.

![Travel Details](image)

On the **Trip Booking Information** page, complete the **Trip Name** and **Trip Description** fields. You can ignore the question “Apply an unused ticket to this reservation?” You must enter the Request ID of the approved request.

Click **Next** if you are ready to purchase the trip or select **Hold Trip** if you are not ready to purchase the trip.

![Trip Booking Information](image)
On the next page, click **Confirm Booking**.

Once you receive the **Finished!** page, scroll to the bottom for the options to print or email your itinerary.

When the booking is complete:

- Navigate to **Travel, Upcoming Trips**.
- Prior to the completion of the trip, **Cancel Trip** will be the **Action**.
- Once the trip is complete, the expense link will appear under **Action**.