

Travel Arrangers' Quick Guide



This Quick Guide reviews the basics of booking travel for a guest in Concur. It covers creating a guest profile, booking travel items, and how to book for the same traveler again at a later date.



Booking Travel for a Guest

1. From <https://travel-expense.finance.columbia.edu/>, Log into Concur.
2. If this is the first time you are booking travel for an individual, navigate to **Travel Home** and click the **Book for a guest** link.

The Create Guest Profile window appears.

3. Complete the **Guest Details** required fields.
4. When you complete a guest profile, you can save the profile so you can book travel for the guest in the future. The **Expiration Date** for the profile defaults to six months. To set a different expiration, enter the date in the Expiration Date field.

5. You can set the guest's **Preferences** for Language, Date Format, and Time Format.
6. Click **Save and Book**. The Plan a Trip window appears for you to select the travel types you are booking.

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Booking Travel for a Guest

Plan a Trip



Select travel types for John Smith
Choose your travel and accommodation needs to get started.

☒ Flight ☒ Rental Car ☒ Hotel ☐ Train

[Continue](#) [Cancel](#)

7. Select the **Travel Types** you are booking for your guest and click the **Continue** button. The Trip Planning screen appears. Notice that you are **Acting as the Guest** in the upper right corner.

   Acting as Smith, John [Cancel](#)

Trip Planning

 Home
 Delegates Dashboard
 Travel >

John Smith
jsmith@traveler.com

New Trip [Edit](#)

 Flight 

 Hotel >

[Add to Trip](#) 

[Search](#)

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From *

8. Search and book the travel items for the guest. After you select each travel type, the Review and Book screen appears.

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Reviewing and Booking Travel Items

When booking a **Flight**, you can select the **Air/Rail Central Pay** mechanism to pay for the guest's flight, or you can add the guest's personal credit card as a payment option.

You can enter **DHS Redress** and **TSA Known Traveler Numbers**, and add **Frequent Traveler Accounts** for the Guest in their Profile.

The screenshot displays the 'Review and Book' interface for a flight booking. The left sidebar contains navigation links: Home, Delegates Dashboard, and Travel. The main content area is divided into sections: 'Advance Details' with fields for Frequent Traveler Account (None), Date of Birth, Gender (Male), DHS Redress, and Known Traveler Number; a 'Save to Profile' checkbox; and a 'Seats' section for the route New York City, NY (JFK) - San Francisco, CA (SFO). The right sidebar shows the 'Form of Payment' as 'Columbia Guest Lodge Card for Air Rail (MAST...)', a checkbox for accepting rules and restrictions, and a 'Book and Continue' button.

When booking **Hotels** or **Rental Cars**, you can use your **Travel and Expense Corporate Card**, if you have one, or you can use the guest's personal card.

Note: The Travel and Expense Corporate Card is used to hold a reservation. The guest must present their personal card at check-in. If you want to pay for a guest's hotel room with your Corporate Card, contact the hotel to set up direct billing. The guest is required to pay for any incidental hotel expenses associated with their stay.

The screenshot displays the 'Review and Book' interface for a hotel booking. The left sidebar contains navigation links: Home, Delegates Dashboard, and Travel. The main content area shows details for 'Inn At The Opera' (3-Star Hotel), including its address, phone number, sustainability score, and booking details (1BR Queen Bed, 215 sq ft, wet bar, fridge, sleeps 2). The right sidebar shows the 'Estimated Total Cost' of \$741.61, a breakdown of costs by date, and a 'Payment' section indicating no valid forms of payment found.

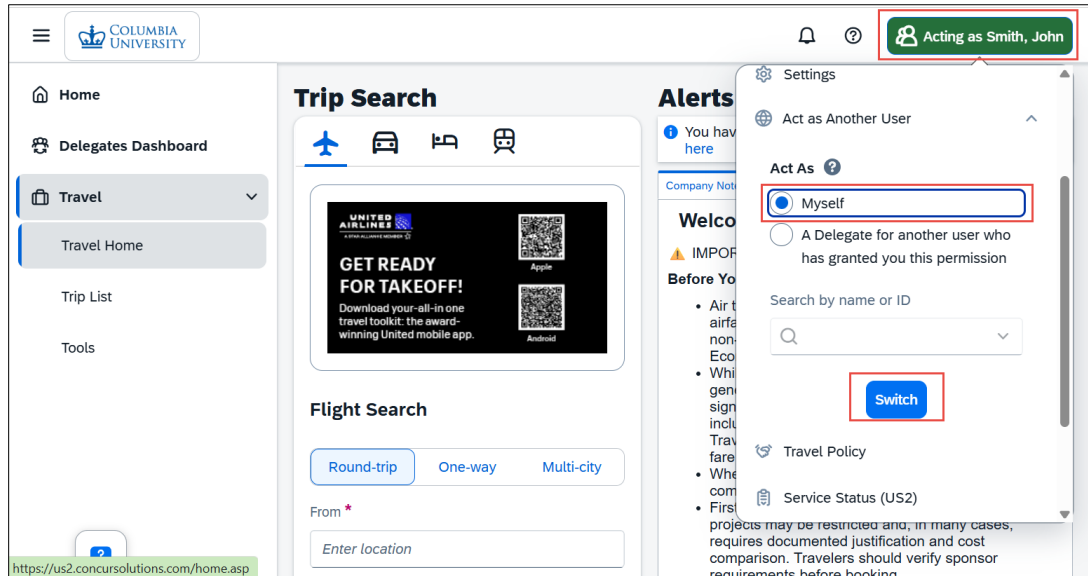
After completing any additional details and selecting a payment method for each travel type you are booking, click the **Book and Continue** button on each Review and Book screen.

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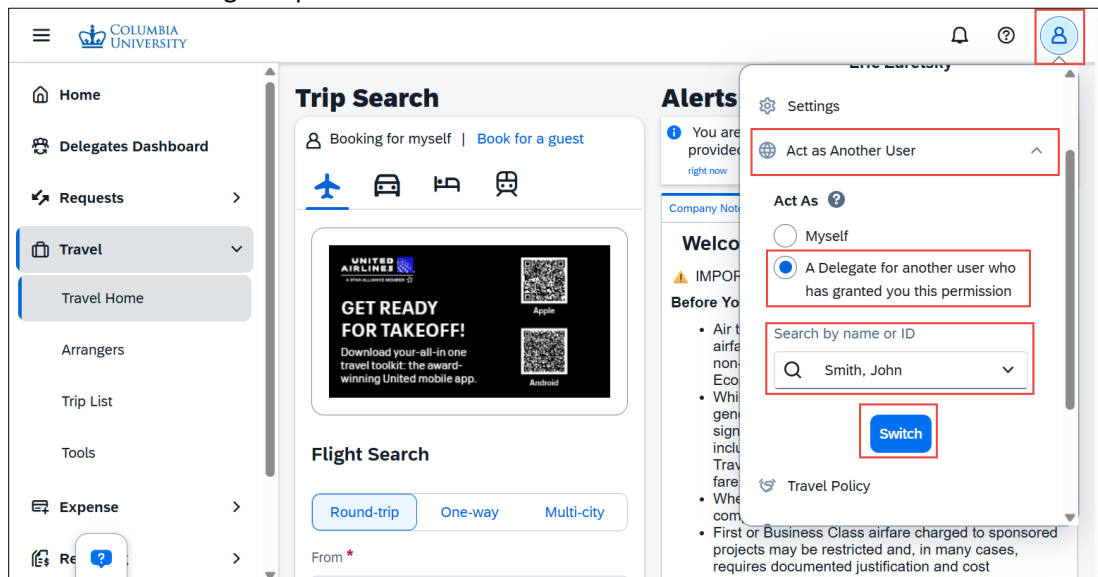


Acting as a Delegate for a Guest

After booking travel for a guest for the first time, to resume working as yourself, click the **Acting as** button, select **Myself**, and click **Switch**.



If you need to book for the guest again in the future, they will be available in your delegate list for the period you initially indicated on their guest profile.



1. Click the **Profile** icon in the upper right corner.
2. Select **Act as another user**.
3. Select the **Act as a delegate** for another user option.
4. Click in the **Search** field to display your delegate list and select the name of the guest from the list.
5. Click the **Switch** button.

The green **Acting as** button indicates that you are booking for the guest.