Travel Arranger Guide

Creating A New Traveler Profile

Please note that only the roles of Travel Manager and Global Arranger can create new user profiles on Egencia.

1. Log into the Egencia online booking tool

2. From the Home Screen, click on "Arrange for a traveler not listed" *(Fig. 1)*.

3. Type in the first and last name of the traveler you are going to add and click on "Find", and the tool will check to see if they have an existing profile, so a duplicate is not created

4. If an existing profile does not come up, you will want to create a new profile by clicking on "Create new account" *(Fig. 2)*.

5. You will click on "New Account" to create a permanent traveler profile; choosing "New Guest Account" would only be used when creating a guest account *(Fig. 3)*

6. Complete the "Create a user account" page *(Fig. 4)*, remembering the following:

   ▪ **First name/Middle Name/Last Name** – This should be the name which is on the traveler's government issued ID. You need to fill the First and Last Name only, as the traveler will fill in their middle name when they complete their profile

   ▪ **Egencia User Name** – You might decide to create a protocol for traveler user names that follows your company's naming convention for user names. One example might be following the format of the traveler's company email address, with an underscore in the place of the @ key, and drop the .com.

     ▪ Email Address is mbrighton@egencia.com = User name is mbrighton_egencia

     ▪ Email Address is joesmith@expedia.com = User name is joesmith_expedia

     ▪ Email Address is tcorey@egencia.com = User name is tcorey_egencia

   ▪ **User's Email Address** – Enter user's email address as it is in the company email system

   ▪ **Company Specific Fields** – your company may require specific information such as an Employee ID number.

   ▪ **Traveler Group and Department** – Use the drop down menu to choose the correct Traveler Group for this Guest Account *(Fig. 5)*.

   ▪ Click on "Create new account", and the profile will show as "pending" until your Travel Manager approves it.

   ▪ Once your Travel Manager approves the new profile, an email will be generated to the traveler which will provide a link to the Egencia online tool, and their user name and password to login.

   ▪ The new profile is now completed, and the traveler will need to go in and update their profile information.

Fig. 1 - *Arrange for a traveler not listed*
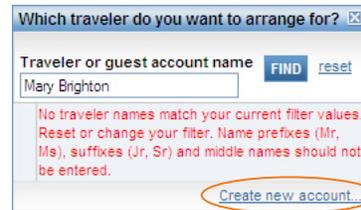

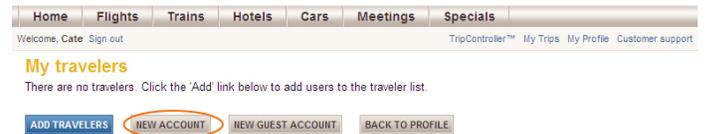**Fig. 2** - *Create new account*

Fig. 3 - *New Account*

Fig. 4 - *Create a user account*

Fig. 5 - *Select traveler group*

Creating a New Guest Account

Guest Accounts can be used for contractors or guests whose travel is being booked and paid for by your company. Please note that it is not necessary to create a new account for each guest.

Guest accounts should be considered **shared "group accounts"**, organized by type of traveler (e.g. HR Recruits, Contractors, Spouses). Guests do not have access to their own accounts or your company's site. A "quick" one-time account, a traveler account does not have to be created before travel is booked.

1. Follow steps 1-4 above, and then Click on the "New Guest Account" option from the "My Travelers" screen *(Fig. 6)*.

2. Fill in the following fields on the "Create a new guest account" page *(Fig. 7)*.

    ▪ **Guest Account Description** – If you are creating a guest account for someone who will be arranging travel for others, just use their name, followed by Guest, "John Smith Guest". If for a department, you can use "HR Candidates", or something to describe the guest account.

    ▪ **Notification email address** – This should be the email address of the guest account owner. They will receive a copy of the itinerary for any travel booked in this guest account.

    ▪ **Select the Traveler Group** – Use the drop down menu to choose the correct Traveler Group for this Guest Account *(Fig. 8)*.

    ▪ **Select the Department** – Use the drop down menu to choose the correct Department

3. Click on "Create new guest account", and the account will show as pending until your Travel Manager approves it.

4. Once guest account is approved, you will want to link this account to the travel profile of the person who will be the administrator of this guest account.

5. Look up the guest account under "Arrange for a Traveler not listed", and click "Select".

6. Under "Traveler" at the top left, you should see the name of the guest account. Click on "Traveler's Profile" on the top right of the page.

7. Once you are in the Traveler's Profile, go to Travel Arranging & Approval, and click on "My Arrangers" *(Fig. 9)*.
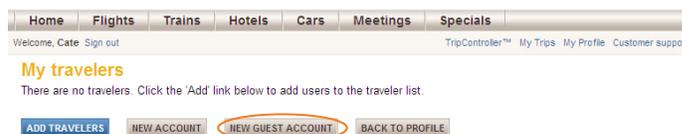
Fig. 6 - *New guest account*

Fig. 7 - *Create a new guest account*

Create a new guest account

Guest accounts accommodate travelers who are associated with your company but do not have their own Egencia accounts.

Enter account description and notification e-mail

Describe this guest account.
All bookings for this account will be associated with this description in your company's reports. The description can be changed at any time.

Guest account description: (Examples: HR Recruit, Contractor, Spouse) *

Enter a notification e-mail address for this guest account.
We'll use this address to confirm travel purchases and reservation changes made for travelers in this guest account.

Notification e-mail address: *

☑ Add this account to the list of users whose travel I can arrange.

Fig. 8 - *Select the traveler group*

Enter company settings

Select the traveler group
The traveler group you choose for this guest account will determine which policy, notification and payment settings apply.

General Traveler Group
Executive Traveler Group
General Traveler Group
Recruit Traveler Group
Road warriors Traveler Group

Select the department
This is used by your company to track travel purchases by department, cost-center or other category.

- unassigned -

Fig. 9 - *Travel arranging & approval*

8. Type in the first and last name of the Guest Account owner, and when you see the correct profile name/email address come up, click on "Add" (*Fig. 10*).

9. You can also change the form of payment in the traveler's profile by clicking View Credit Cards and adding a new card (*Fig. 11*).

10. The Guest Account Owner will now see the guest account listed in the drop down box "Choose a traveler". They can click on the Guest Account from this drop down menu and can start booking travel (*Fig. 12*).

11. The guest account has now been created and is ready for use.

Roles in Your Egencia Site

There are several roles available for your Egencia site:

- **Travel Manager**
  Can arrange travel for all users and perform all administrative duties. This includes access to Central Billing, Reporting, Policy, Managing Users, etc.

- **Global Arranger**
  Can arrange travel and access profiles for all users.

- **Travel Arranger**
  Can arrange travel for assigned users and access their profiles; these users are assigned by the Travel Manager

- **Traveler**
  Can arrange own travel and access his or her own profile.

- **Guest**
  Guest accounts should be considered **shared "group accounts"**, organized by type of traveler (e.g. HR Recruits, Contractors, Spouses). Guests do not have access to their own accounts or your company's site. A "quick" one-time account, a traveler account does not have to be created before travel is booked. Employees should not be assigned this role.

Fig. 10 - *My arrangers*

Fig. 11 - *Payment options*

Fig. 12 - *Choose a traveler*