

# Creating a Guest Template in Egencia

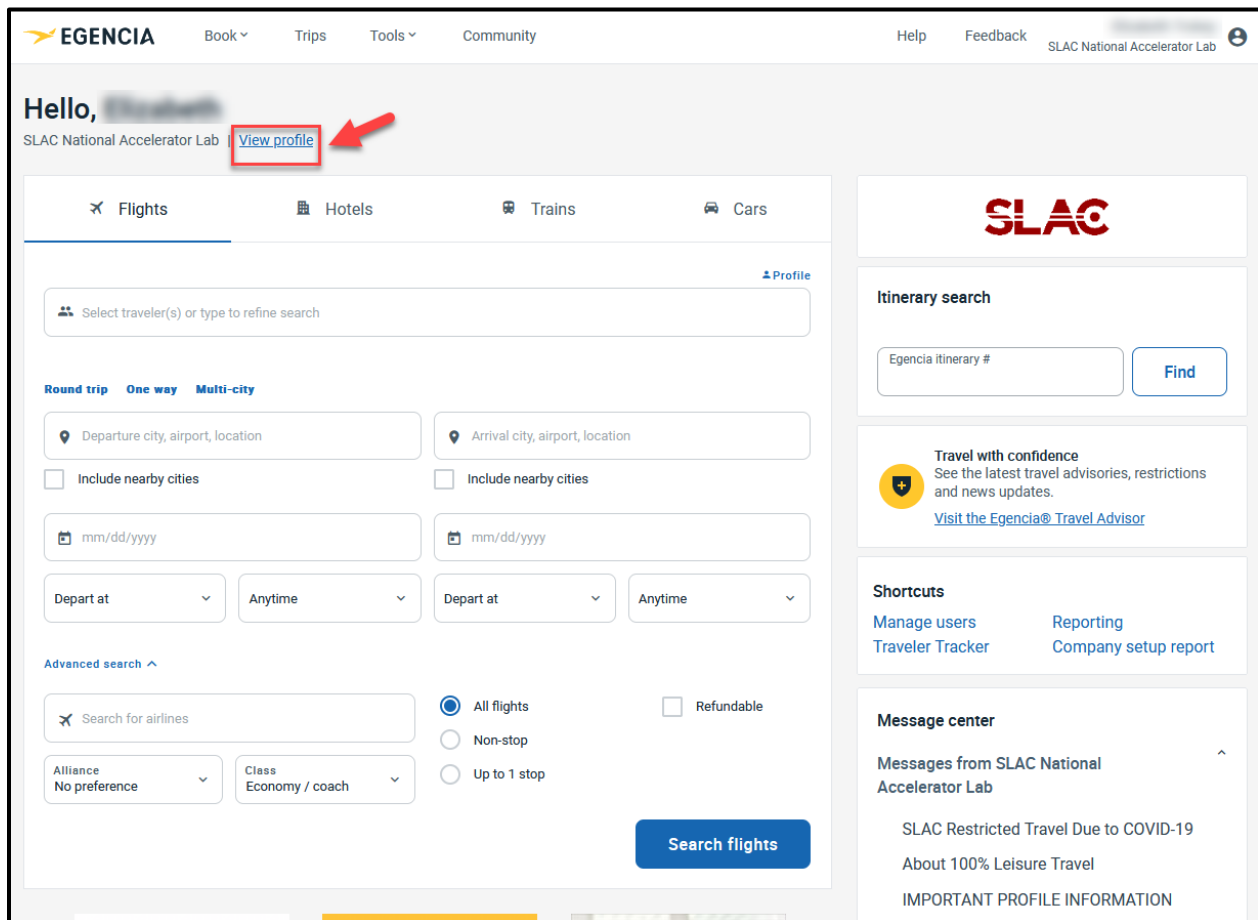
## How To: Create a Guest Template in Egencia

An arranger can log into Egencia and invite Sponsored Guests/Visitors to arrange their own travel in Egencia under the Guest Management Function. Arrangers will have the ability to invite Sponsored Guests/Visitors through an email, by generating a link or they can create a profile without notifying the traveler – meaning if they would like to do the arrangements on their behalf. Below are screenshots for additional guidance.

### Step 1

[Log in to Egencia](#) with your SLAC username and password.

Click "View Profile"



The screenshot displays the Egencia user interface. At the top, the navigation bar includes the Egencia logo, 'Book', 'Trips', 'Tools', and 'Community'. On the right, there are links for 'Help', 'Feedback', and the user's name 'SLAC National Accelerator Lab'. Below the navigation bar, a greeting says 'Hello, [User Name]' with 'SLAC National Accelerator Lab' underneath. A red box highlights the 'View profile' link, with a red arrow pointing to it. The main content area is divided into sections: 'Flights', 'Hotels', 'Trains', and 'Cars'. The 'Flights' section is active and contains a search form with fields for 'Select traveler(s) or type to refine search', 'Round trip', 'One way', and 'Multi-city'. It also includes fields for 'Departure city, airport, location', 'Arrival city, airport, location', 'Include nearby cities', and 'Depart at' (with 'Anytime' selected). An 'Advanced search' section includes a search for airlines, radio buttons for 'All flights', 'Non-stop', and 'Up to 1 stop', and checkboxes for 'Refundable'. A 'Search flights' button is at the bottom. On the right sidebar, there is a 'SLAC' logo, an 'Itinerary search' section with an 'Egencia itinerary #' field and a 'Find' button, a 'Travel with confidence' section with a 'Visit the Egencia® Travel Advisor' link, a 'Shortcuts' section with links for 'Manage users', 'Reporting', 'Traveler Tracker', and 'Company setup report', and a 'Message center' section with a message from 'SLAC National Accelerator Lab' about 'SLAC Restricted Travel Due to COVID-19' and 'IMPORTANT PROFILE INFORMATION'.

## Step 2

Select the “Custom Data Fields” section and take note of your profile information.

The screenshot shows a user profile page with a sidebar on the left and a main content area on the right. The sidebar contains several sections: Personal information, Account settings, Travel documents (with an 'Add passport' button), Custom data fields (highlighted with a red box and a red circle containing the number '1'), User associations, Arrange and approve, Payment type, Loyalty programs, and Notifications. The main content area is titled 'Custom data fields' and contains a form with the following fields: Department (a dropdown menu with 'Dir Office - SLAC Director's Office' selected), Department (a text input field with 'BSD Controllers Office'), Manager (a text input field with a blurred name), and Affiliation (a dropdown menu with 'Employee' selected). A red box and a red circle containing the number '2' highlight the Department and Affiliation fields. A blue 'Save' button is located at the bottom right of the form. At the top right of the page, there is a search bar and the text 'Account status Active'. A note at the top right states 'Fields marked with asterisk (\*) are mandatory'.

Account status  
Active

Fields marked with asterisk (\*) are mandatory

**Personal information**  
Name, phone number, address

**Account settings**  
Email ID, password

**Travel documents** ▲ Add passport  
Passports, other documents

**Custom data fields** →  
Department and custom data fields

**User associations**  
Traveler groups, roles

**Arrange and approve**  
Travel arranging and approving settings

**Payment type**  
Payment means, credits and coupons

**Loyalty programs**  
Frequent traveler accounts

**Notifications**  
Email alerts settings

**Custom data fields**

Department Dir Office - SLAC Director's Office

Department BSD Controllers Office

Manager

Affiliation (e.g. Employee Student) Employee

Save

### Step 3

Navigate to the Tools tab and select “Guest Booking” under User Management

The screenshot displays the EGENCIA user management interface. The top navigation bar includes the EGENCIA logo, a 'Book' dropdown, 'Trips', 'Tools' (highlighted with a red box and a '1' in a red circle), and 'Community'. On the right side of the navigation bar are 'Help', 'Feedback', and the user's name 'Elizabeth Trokey' with a profile icon. The main content area is divided into a left sidebar and a central menu. The sidebar contains sections for 'Profile' (with user details for Elizabeth Trokey), 'Personal information', 'Account settings', 'Travel documents' (with an 'Add passport' button), 'Custom data fields', 'User associations', 'Arrange and approve', and 'Payment type'. The central menu is organized into several categories: 'General' (Connect community, Help center, EgenCIA® Travel Advisor), 'Travel Management' (Trip Approval Requests), 'Travel Policy' (Approval Configuration, Custom Reason Codes, Supplier Policy, Traveler Group, TripController™ Configuration, Traveler policy), 'User Management' (Manage Users, Search Users, Create Users, Guest Booking (highlighted with a red box and a '2' in a red circle), Manage Bulk Data, Arranger Group), 'Company Management' (Favorite links, Company Profile, Department Codes, Custom Data Fields, Custom data fields mapping, Towncar Field Mappings, Central Billing, Traveler Messages, Custom Location, Car Settings (new)), 'Reporting' (Reporting, Company setup report (new)), and 'Risk Management' (Traveler Tracker). A 'Save' button is located at the bottom right of the central menu area.

## Step 4

Create New Template by entering a Template Name, Access Valid Date, the Business Information, specify any other admins to be included, indicate which option you would like to use for registering your guests and click the Save As Template button.

**NOTE: there are multiple screenshots to capture the information for this particular step.**

**EGENCIA** Book ▾ Trips Tools ▾ Community Help Feedback SLAC National Accelerator Lab

### Create new template

Guests will get a link to fill in their personal details and register on Egencia. Please setup approval and policy for guest bookings.  
Fields marked with asterisk (\*) are mandatory

**Important information**  
We highly recommend enabling approval enforcement so that you can approve or reject guest bookings before they are confirmed. Please keep in mind that you are responsible for guest bookings. If you haven't configured guest approval setting, please use the link below. [Configure approval settings.](#)

**1** Template name \*  
Example Template

**2** Access valid until \*  
Set duration for which guest can access Egencia  
4/30/2023

**3** Business information

Traveler Group \*  
General Traveler Group **This is the default - leave as is**

Department code  
Dir Office - SLAC Director's Office **This should match your personal profile**

Department

Dir Office - SLAC Director's Office

x

3

Department

BSD Controllers Office

This should match your personal profile

Manager

[Redacted]

This should match your personal profile

Affiliation (e.g. Employee Student)

Employee

Type "Employee" in this field

If not funded by DOE provide fund name

Is this trip Business or Personal Travel? \*

Business Travel

Select "Business Travel" from the drop down

x

v

If Combined - What component is Personal?

Concur Travel Request ID (example, 69KU) \*

N/A

Type "N/A" in this field

Arrangers

Manage

Assign users who can arrange travel for guests (optional)

No Arranger selected

**Approvers** [Manage](#)  
Assign users who can approve travel for guests (optional)

No Approver selected

ⓘ You can set up level 1 approver(s) here. Visit user profile to set other level approvers

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**Invite guest to register** 4

Guest will receive a link to register on Egencia. You will receive an email notification after the guest has registered.

**Guest travel admin \***  
You can specify additional users such as travel and guest managers to receive registration notifications.

This will default to you personally. You can add other admins with Guest authority

**Options for registering guests** 5

**Options for guest to self register**

**Send email invites**

Each guest will receive a unique link to register on Egencia. Post registration, the guest will have controlled access to Egencia platform as per defined access rights. >

**Generate invite link**

Generate a reusable link that could be used by guests to self register. You can share this link externally and we recommend inviting guests by email. Any guests registering via this link will have to be approved by guest admin first. >

**Option to create guest users for Travel Managers**

**Create guest user profile**

You can create guest user profile and select if the guest has access to Egencia. >

**Save as template** 6

## Step 5

### Review your created Templates

### Guest Booking

Setup guest registration templates

[+ Create new template](#)

**Important!** New bookings will not be possible using existing legacy guest accounts after 31 March 2023. Please use [this feature](#) to bulk migrate them into new guest templates.

**Filter by** [Clear](#)

**Template name**

**Traveller group**

**Template creator**

### Templates

Showing 1 results

Sort by [Recently added](#)

Example Template			
Traveler Group	Department	Creator Name	Created date
General Traveler Group	Dir Office-SLAC Director's Office	[Redacted]	Mar 10, 2023
<a href="#">Send email invite</a>	<a href="#">Copy link</a>	<a href="#">Create guest profile</a>	Access valid until Apr 30, 2023

