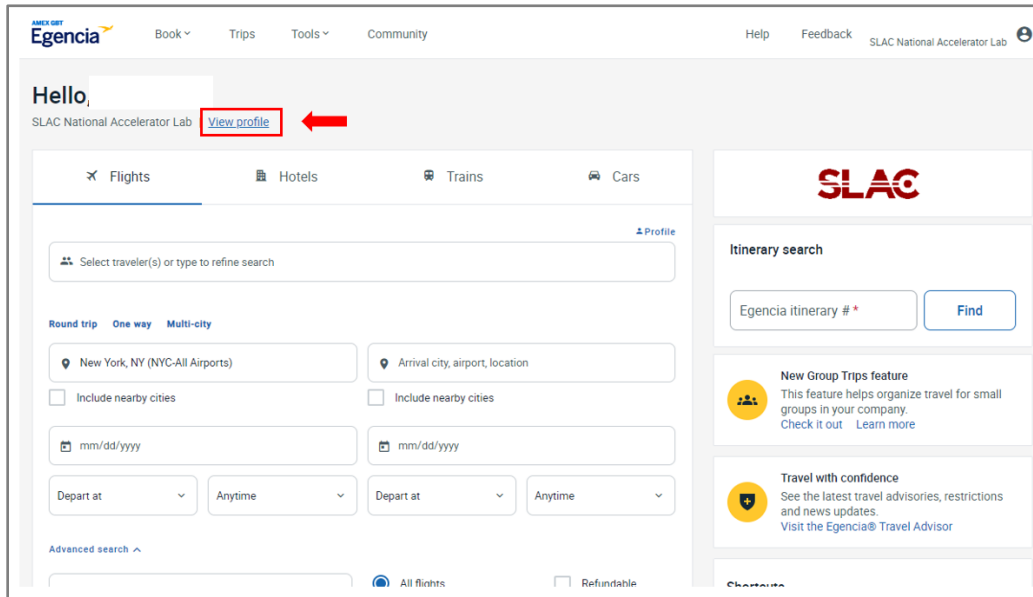


Creating a Guest Template in Egencia

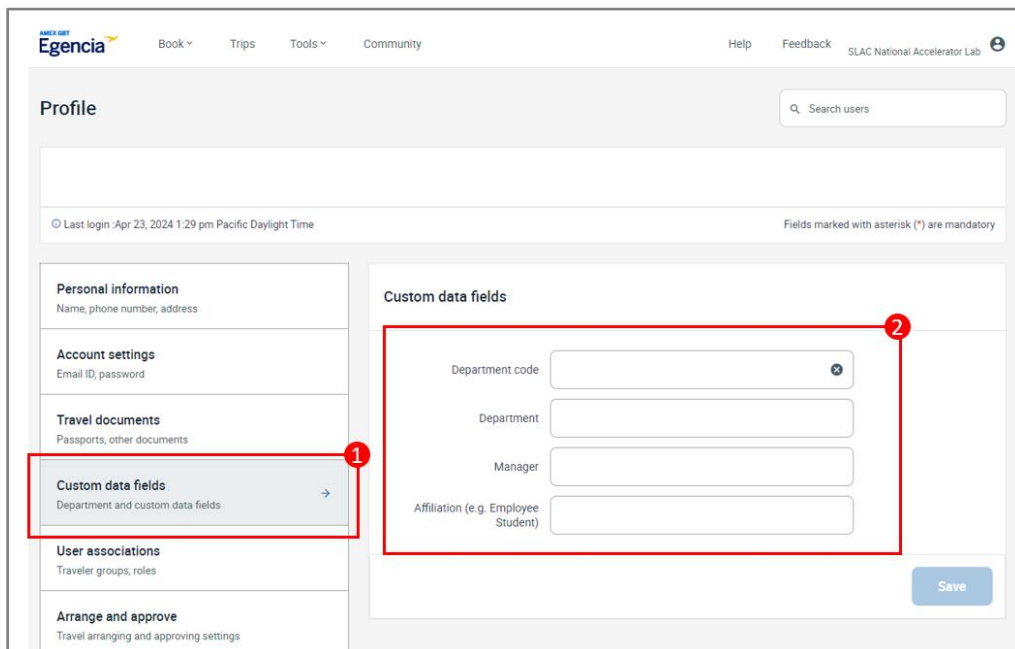
An arranger can log into Egencia and invite Sponsored Guests/Visitors to arrange their own travel in Egencia under the **Guest Management Function**. Arrangers will have the ability to invite Sponsored Guests/Visitors through an email, by generating a link or they can create a profile without notifying 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**.

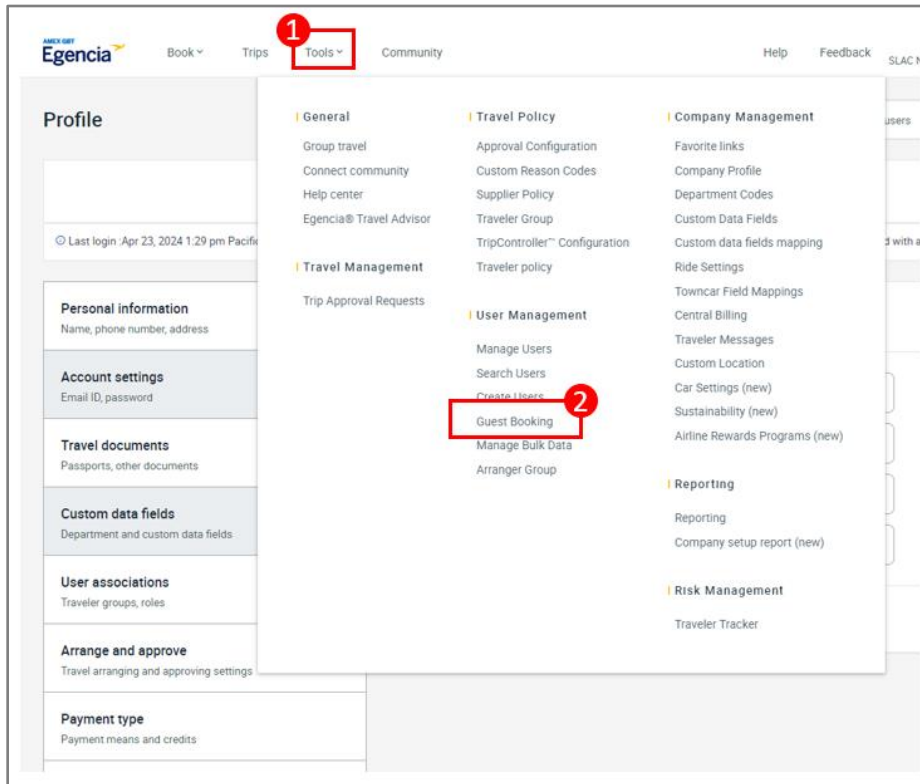
Step 2: Click **“View Profile”**



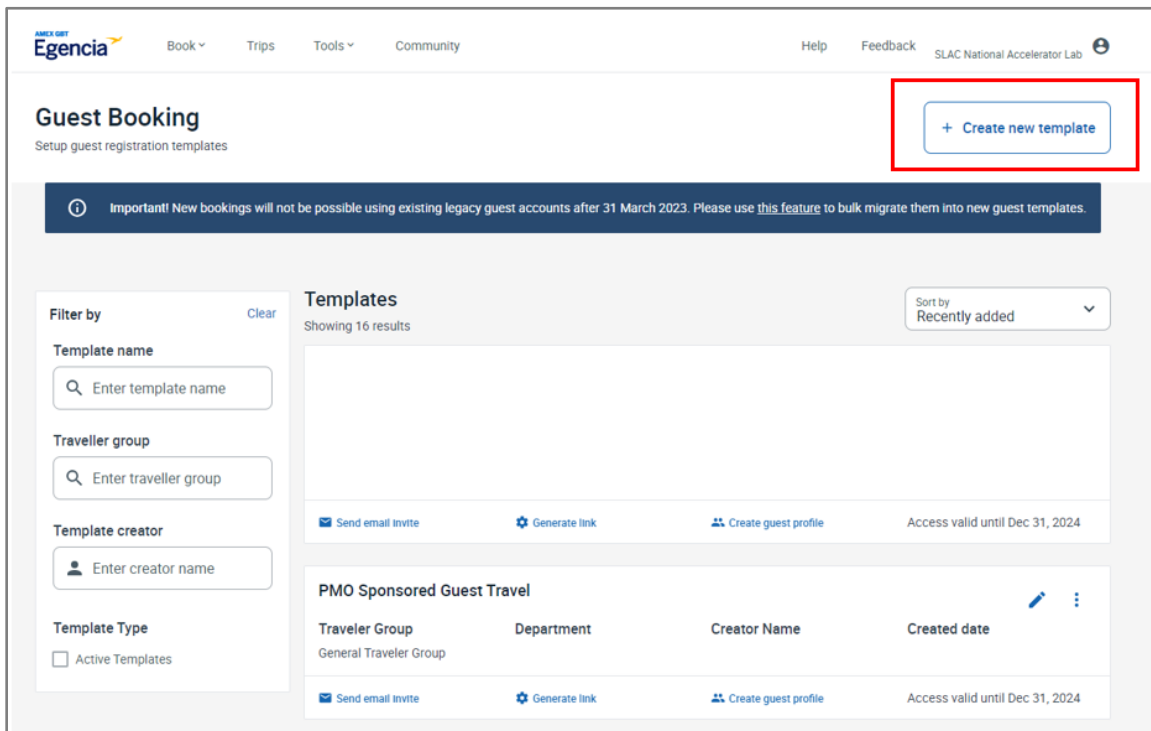
Step 3: Select the **“Custom Data Fields”** section and take note of your profile information.



Step 4: Navigate to the “Tools” tab and select “Guest Booking” under “User Management.”



Step 5: Click “+ Create New Template.”



Step 6: Create your New Template by entering a "Template Name," "Access Valid Date," the "Business Information," specifying any other admins to be included, indicating which option you would like to use for registering your guests, and clicking the "Save As Template" button.



There are multiple screenshots to capture the information for this particular step.

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](#)

Template name *

Access valid until *
Set duration for which guest can access Egencia.
mm/dd/yyyy

Private template

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.
Guest will receive a link to register on Egencia. You will receive an email notification after the guest has registered.
All Travel managers and Guest managers (acting as owners) can be added as Travel admins.

Business information

Traveler Group *
General Traveler Group This is default – leave as is

Department code
Please select This should match your personal profile

Department
This should match your personal profile

Manager
This should match your personal profile

Affiliation (e.g. Employee Student)
Type "Employee" in this field

If not funded by DOE provide fund name

Is this trip Business or Personal Travel?
Please select Select "Business Travel" from the drop down

If Combined - What component is Personal?

Concur Travel Request ID (example, 69KU)

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

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. >

View templates 6 Save as template

Step 7: Review your created Templates.

Egencia Book Trips Tools Community Help Feedback SLAC National Accelerator Lab

Guest Booking + Create new template

Setup guest registration templates

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

Template Type
 Active Templates

Templates Sort by Recently added

Showing 16 results

<input checked="" type="checkbox"/> Send email invite	<input checked="" type="checkbox"/> Generate link	<input checked="" type="checkbox"/> Create guest profile	Access valid until Dec 31, 2024
PMO Sponsored Guest Travel			
<input checked="" type="checkbox"/> Send email invite	<input checked="" type="checkbox"/> Generate link	<input checked="" type="checkbox"/> Create guest profile	Access valid until Dec 31, 2024

Private template