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Setting Up Personal Information in Profile Settings

1. Start at the **EBS Homepage**, select **Travel and Expense, SAP Concur.** If you do not have Concur on the portal or cannot login, please contact the Travel at State Project team via email at concurhelp@msu.edu.
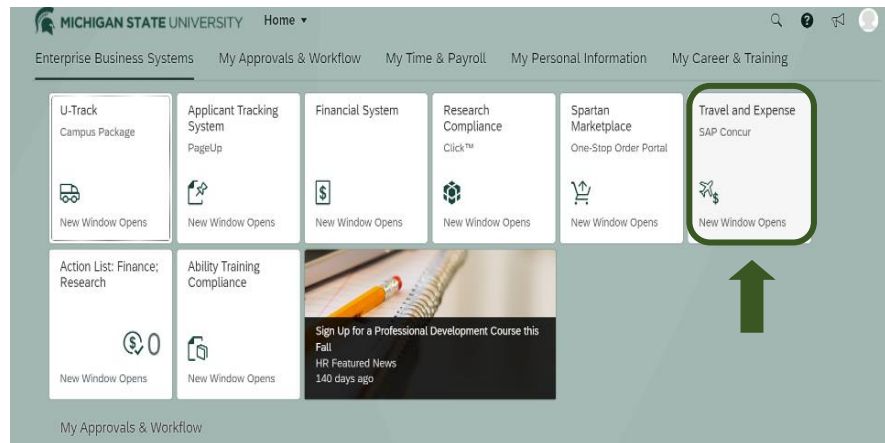

Exhibit 1

2. From the **Concur Homepage**, select **Profile** >**Profile Settings** >**Personal Information** and complete the following information.
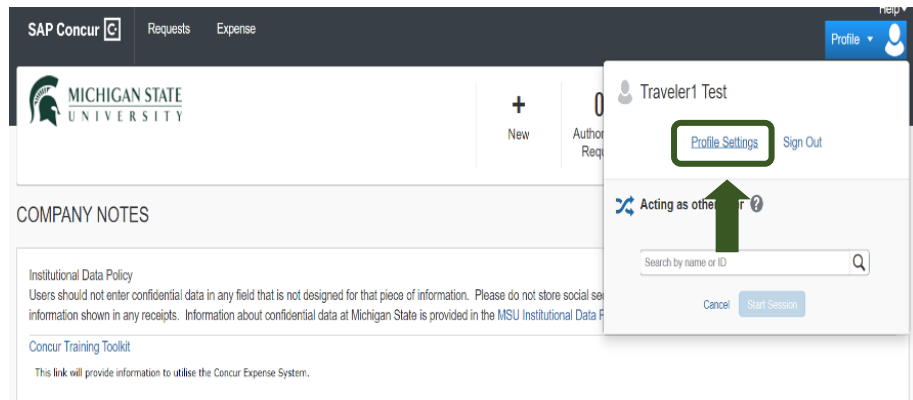

Exhibit 2

NOTE: **First and Last Name**, **Company Information**, and **Work Address** will be populated from your University HR record. If any of that information is incorrect, contact Human Resources.
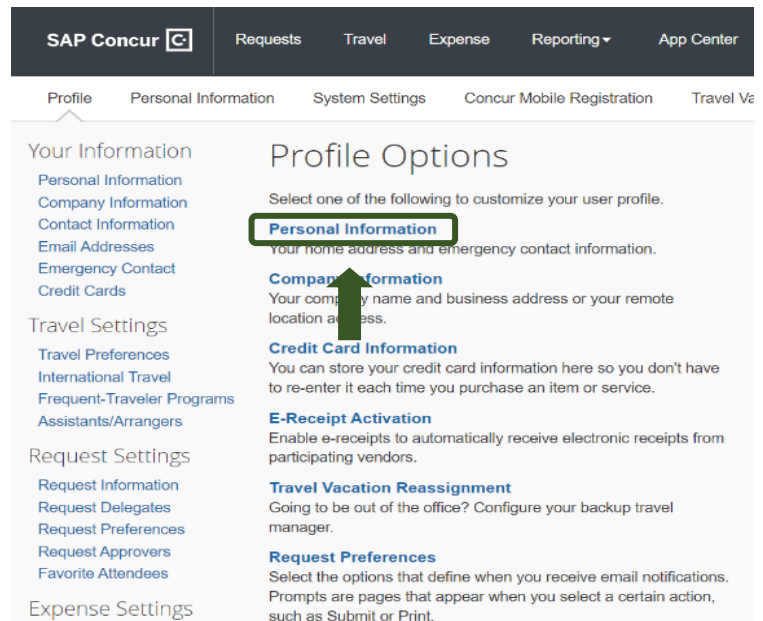

Exhibit 3

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2

a. **Home Address** – **Required**

b. **Contact Information** – **Required**: Enter a work or home phone number.

c. **Email Addresses** – **Required**: Select the **Verify** link and a code will be sent your @msu.edu email address. Copy the code from the email message and return to your profile. Paste the code you received into the **Enter Code** box and then select **OK**.

Exhibit 4

NOTE: You must verify any departmental email you typically use. Your "@msu.edu" email address has already populated your profile. Verifying your email address allows you to email your receipts to receipts@concur.com and forward travel plans to plans@concur.com. Up to 2 additional email addresses can be added by selecting **+Add an Email Address** and Concur will send verification codes to those email addresses.
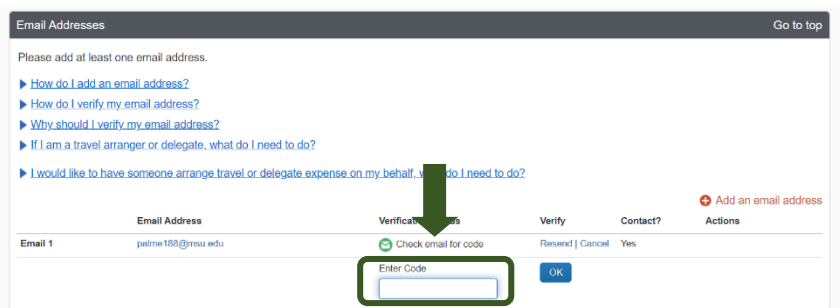

Exhibit 5

g. **Emergency Contact** – **Required**: If your emergency contact's address is different from your own, unselect **Address Same as Employee**.

h. **Travel Preferences**: If you participate in Frequent Traveler Programs, select **Add a Program** and enter number.

i. **TSA Secure Flight** – **Required**: Enter gender and date of birth and if you have TSA Pre-check, enter the number.

j. **International Travel: Passports and Visas**: Enter passport/visa information and select **Save**. Entering passport and visa information in Profile allows it to be available when booking travel.

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Becoming an Arranger or Assigning an Arranger

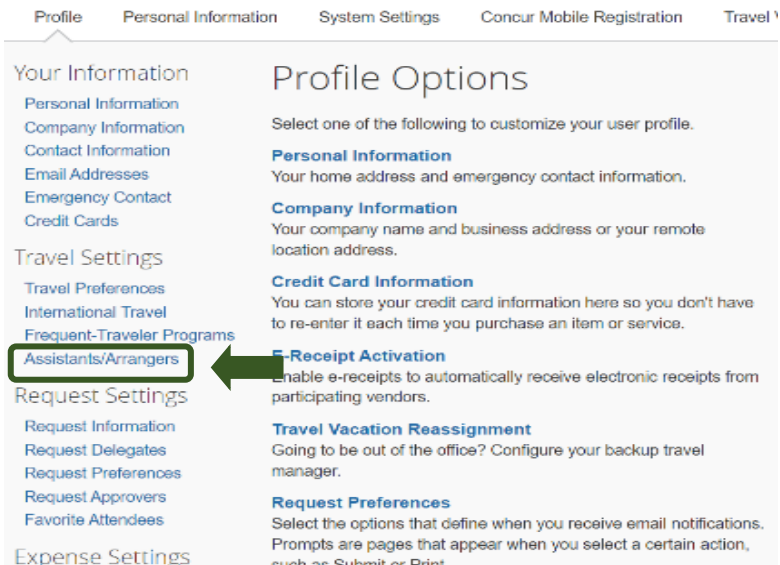1. From the **Concur Homepage**, select **Profile Settings** >**Assistant/Arrangers** under Travel Settings.

Exhibit 6

2. Select **+Add an Assistant** and enter your Assistant's/Arranger's name or email address. Select the appropriate boxes and select **Save**. You can add as many Assistants as you wish.
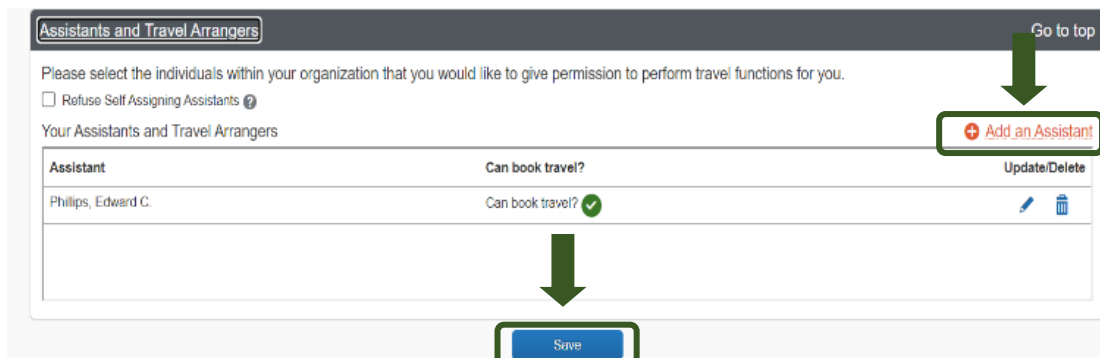

Exhibit 7

3. Once complete, select **Save** on the Settings page.

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Becoming a Delegate or Assigning a Delegate

A traveler can modify his/her own profile in Concur, however, if the traveler has assigned a Delegate, the Delegate can make all changes to the traveler's profile except Request/Expense Delegate assignments and Mobile Registrations. If you would like to have another employee arrange travel and prepare requests and expense reports on your behalf, you must assign him/her as a Delegate. The traveler must enter any assignment of delegation and Delegates should not update their travelers' profiles without their expressed permission.

1. Select **Profile Settings**
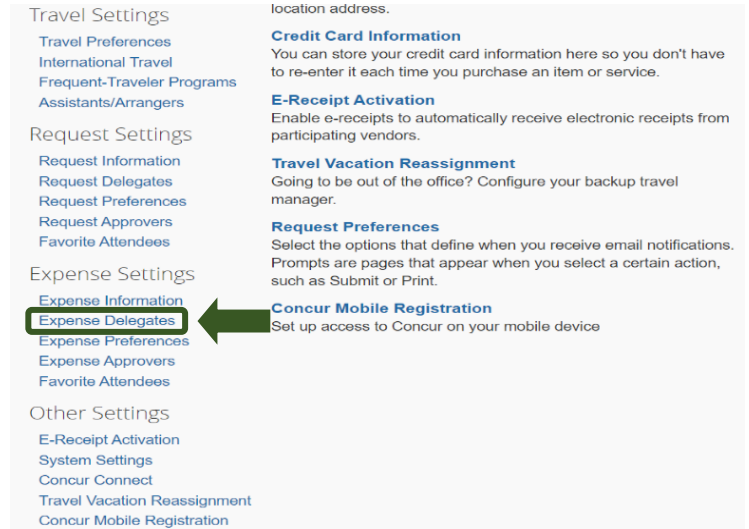>**Expense Delegates** under Expense Settings.

Exhibit 8

2. Select **Add** and enter the MSU employee name or email address you wish to be your Delegate.

3. Select the **Can Prepare** box and **Receives Emails** box and then select **Save**. You can add as many Delegates as you wish, but Delegates may not submit Expense Reports on behalf of travelers. Additionally, any changes made to the Expense Settings will also carry through to Request Settings.
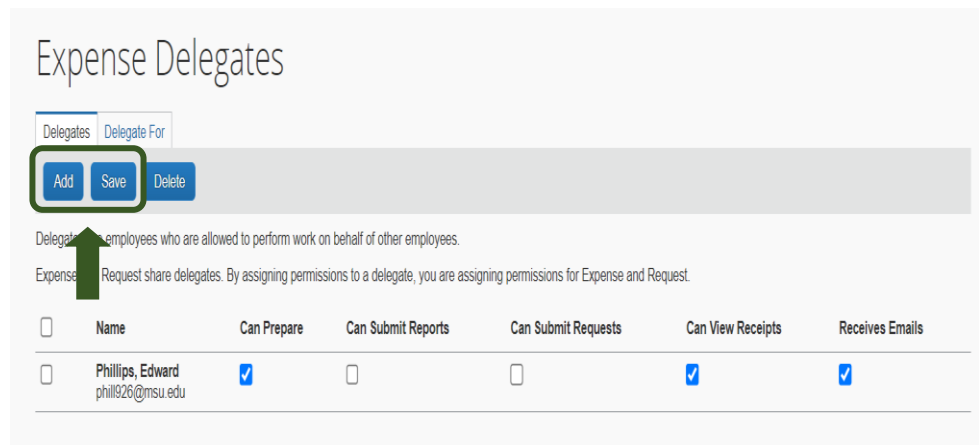

Exhibit 9

Activating E-Receipts

1. Select **Profile Settings**
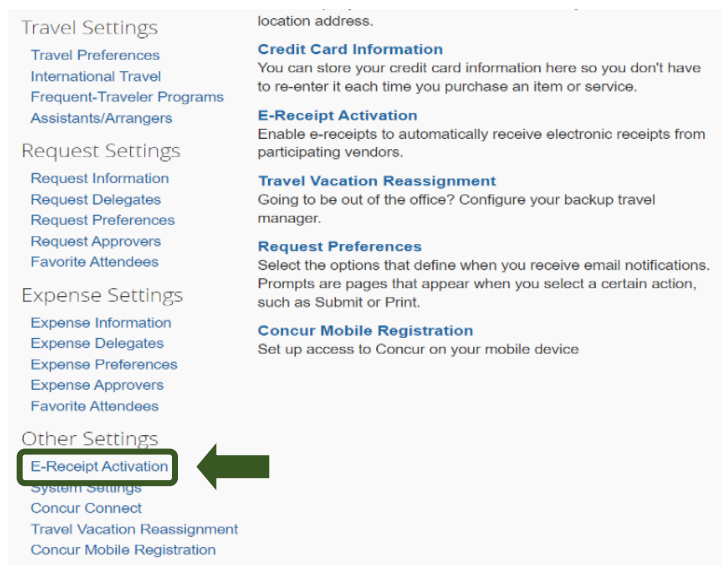>**E-Receipt Activation** under Other Settings.

Exhibit 10

2. Select **Enable**
>**I Agree** to the E-Receipt Activation Agreement. You will receive a confirmation that E-Receipts have been activated.
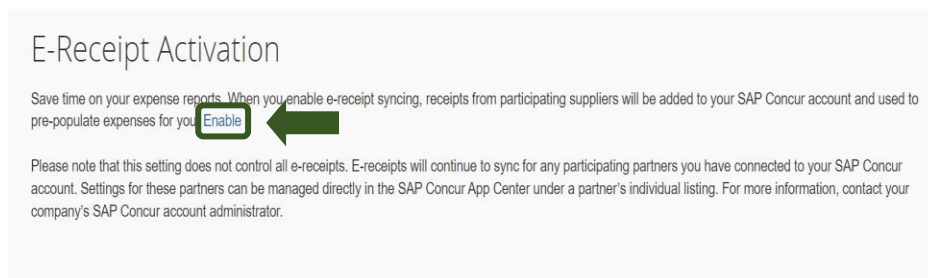

Exhibit 11

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