

**Student Employee:** Travel Requests and Expense reports can be initiated by the <u>student employee</u> but, airline tickets must be booked by a faculty/staff member on behalf of the student using the **Book for a Guest feature**.

**Student non-employee:** Students that are <u>non-employees</u> cannot use Concur Request, Travel or Expense. These activities must be done by a faculty/staff member that has the **Book for a Guest role** active in their Concur session.

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### Creating a Request for a Student

#### **Student Employee:**

- complete their profile, including verifying email address.
- Assign Delegate rights to the faculty/staff member managing the student employee's Request.
  - Select Profile Settings

>Request
Delegates under
Request
Settings.

- 2. Select **Add** and enter the *Employee Name, Email Address,* or *Login ID* of the desired delegate.
- 3. Select the individual's name from the pull-down menu and select **Save**.

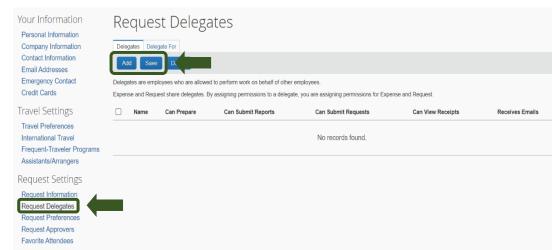


Exhibit 1

 Either the student employee or the Faculty/Staff member can then create and submit the Request. Create the new Request, in the Request Policy field, select Profiled Traveler Policy.

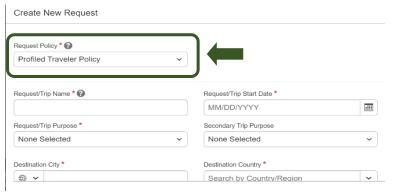


Exhibit 2

5. In the Traveler Type field, select **Student**.

#### Create New Request

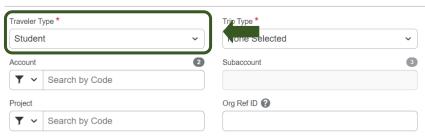


Exhibit 3



#### **Student Non-Employee:**

 A faculty/staff member has to be the one to create a new Request.
 Select Non-Profiled Traveler
 Policy in the Request Policy field.

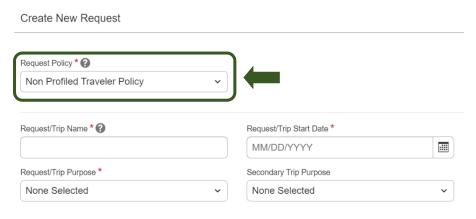


Exhibit 4

o Select **Guest** in the Traveler Type field.

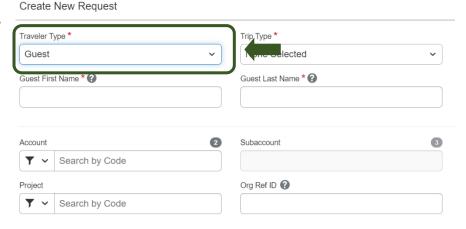


Exhibit 5



### Booking Travel for a Student

Specifically, airline tickets for a student (this applies both for <u>student employees</u>) a faculty/staff member needs to be the one to book.

- After logging in to Concur, select **Book for a Guest** if you are a faculty/staff member booking on behalf of a student.
- Select **Book for Myself** if you are a student employee booking a car rental and/or hotel reservation.
- Select the Air/Rail, Car, and/or Hotel tab and complete the necessary fields.
- After booking, you will then be able to pay for it with the MSU card on file in Concur (Conlin Agency Card).

NOTE: If you do not have the Book for a guest role active in your profile, please email <a href="mailto:concurhelp@msu.edu">concurhelp@msu.edu</a> requesting the role to be added to your profile.

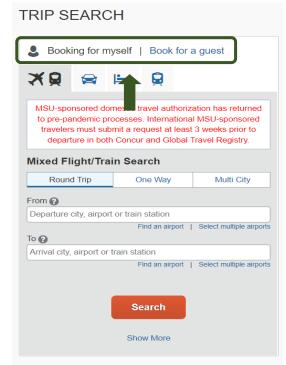


Exhibit 6



### Creating an Expense Report for a Student

#### **Student Employee:**

- Once the charge is available in the faculty/staff member's Concur Expense Available Expenses, the faculty/staff
  member must email <u>accounting@ctlr.msu.edu</u> requesting to have the card transaction transferred from their
  profile to the student employee's profile.
- Delegate or student employee can create and submit the expense report.

#### **Student Non-Employee:**

- o Delegate will create and submit the expense report on behalf of the non-employee student.
- o If a reimbursement is due to the student, create an SP vendor in KFS for the non-employee student and use that SP Vendor code when creating the expense report in Concur.

# Student Employee and Student Non-Employee Permissions Chart

	Student Employee	Student Non-Employee
Complete & Update Profile	Х	
Assign Delegate to Faculty/Staff	Х	
Create & Submit Request	Х	
Faculty/Staff Create & Submit Request using "Book for a guest"	Х	Х
Faculty/Staff Books Airfare	Х	Х
Faculty/Staff Email <u>accounting@ctlr.msu.edu</u> to transfer card transactions to profile	X	
Create & Submit Expense Report	X	
Faculty/Staff Create & Submit Expense Report	X	Х
Faculty/Staff Create SP Vendor in KFS		X