Quick Reference Card – Requests

Getting Started

Log in to https://ebs.msu.edu/

1. Click the link for **Travel and Expense – SAP Concur.**
2. You will be taken to the Concur *Homepage*.
3. If you are booking travel for another user, verify you have delegated as them, and their name appears in the upper right.

Note: Your Concur **Profile** must be completely set up prior to creating Requests or booking Travel. Refer to the Getting Started – User Profile Quick Reference Guide.

Create a Travel Request

1. Click **Requests** then **Create New Request** *or* on the *Homepage* click **New** then **Start a Request**.
2. In the **Create New Request** header, complete all required fields (*). Travel dates should include the entire trip, including any personal days.
3. Click **Save**. A 4-digit **Request ID** is generated.
4. Enter **Expected Expenses** (airfare, car rental, hotel, per diem, etc.) by clicking **Add**. If exact costs are not known, enter *estimated* amounts.
5. Click **Save**.
6. When finished click **Submit Request** then **Accept & Submit**.

Create a Cash Advance

1. Complete the **Create New Request** header information.
2. Within the **New Request** click on **Request Details** and **Add Cash Advance** (under Linked Add-ons).
3. Add your **Cash Advance Amount** and click **Save**.
4. **Submit** the request after adding any additional **Expected Expenses.**
    - Cash advance is approved when Request approval is final.

Delete or Cancel a Cash Advance

- If you have not yet submitted the request, you can remove the **Cash Advance** by going into the **Cash Advance** that you created and click on the **Trash Can** at the top.

View Requests

1. To view a request, either:
    - Click the **Requests** tab at the top of the *Homepage*.

      or
    - On the *Homepage* click on **Authorization Requests**.
2. Once you click on one of the above options it will bring you to the **Manage Requests** page where you can click on the **Request** you want to view.

Copy a Request

1. On the **Manage Requests** page, select the desired request.
2. Click **Copy Request**, then the Copy Request page appears.
3. On this page:
    - By default, the system provides a name for the copy. Change it, if desired.
    - By default, the system sets the start date of the source request.
        - If you need to edit the dates for your **Copy Request** – once you **Create New Request** *(copy)*, click on **Request Details** and **Edit Request Header**.
    - Indicate whether to copy **Expected Expenses** and **Cash Advances.**

Acting as a Delegate

1. To act as another user, you will go to the top right on the *Homepage* and click on your **Profile** dropdown.
2. Under **Acting As Other User**, type and search the name of the delegate you are Requesting travel for and click **Start Session**.

Edit a Request

Approved Requests may not be edited.
To edit a **Request** that has not been submitted:

1. To open a request:
   - Click the **Requests** tab at the top of the *Homepage*.
   - Once you are on the **Manage Requests** page, you can click on the **Request** you want to **Edit**.
   - If the desired request does not appear in the **Request Library**, choose the dropdown next to **View** .
2. Make the desired Edits.
   - To Edit the **Header Details,** click on the dropdown **Request Details** then **Edit Request Header**, make your changes and click **Save**.
   - To Edit **Expected Expenses**, click on the box next to the *Expense Type*, click **Edit**, make your changes, then click **Save**.
3. Once all edits have been made, click **Save**.

Recall a Request

You cannot change, cancel, or delete a Request that has been submitted unless you **Recall** it first.

1. Click the **Requests** tab at the top of the *Homepage*.
2. Once you are on the **Manage Requests** page, you can click on the **Request** you want to **Recall.**
3. Click **Recall,** then **Yes** to confirm the recall.
4. Click on **More Actions** then **Cancel Request**, or make necessary changes, and **Submit Request**.

Delete a Request

If your **Request** was already **Submitted**, please refer to above **Recall a Request** for instructions.

1. To **Delete** a **Not Submitted Request**, click the **Requests** tab at the top of the *Homepage*.
2. Once you are on the **Manage Requests** page, you can click on the **Request** you want to **Delete.**
3. Click the **Trash Can** next to the *Request Name*, click **Yes**.

Print Requests

1. Click the **Requests** tab at the top of the *Homepage*.
2. Once you are on the **Manage Requests** page, you can click on the desired **Request**.
3. When you are in the **Request**, click **Print/Share** dropdown, then **MSU-Request Printed Report**.
4. You will have the option to **Print**, **Save as PDF**, or **Email**.

Approve a Request

1. To **Approve** a **Request**, either:
   - Click the **Approvals** tab at the top of the *Homepage*.

   or
   - On the *Homepage* click on **Required Approvals.**
2. Once you are on the **Approvals** page, click on the **Request** you want to **Approve**.
3. Click **Approve**.

Apply a Request to a Report

Once the request has been approved and the expenses have been incurred, the user associates the request with an expense report as proof that the expenses were pre-approved. There are several ways to associate a request with a report:

- Create a new report and apply the request from the report header
- Create a new report from the request list
- Create a new report from an approved request
- Apply a request to an existing report

Questions

Please Contact: travel@ctlr.msu.edu