TRAVEL@STATE

Quick Reference Card – Requests

Getting Started

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

1. Click the link for **Travel and Expense – SAP Concur**.
2. Complete the login screen by adding your msu.edu email address and password.
3. You will be taken to the Concur home page.
4. If you are booking travel for another user, verify you have delegated in 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 Profile Quick Reference Guide, or the Travel and Expense Management User Guide for instructions.

Create a Travel Request

1. Click **Requests, Create New, New Requests**.
2. In the **Request Header**, complete all required fields (red bar). Travel dates should encompass the entire trip – including any personal days.
3. Click **Save**. A request number is generated.
4. Enter **Segments** (airfare, car rental, hotel). Other anticipated **Expenses** can be added. If exact costs are not known, enter estimated amounts.
5. Click **Save**.
6. When finished click **Submit Request**.
7. Click **Accept & Submit**.

Create a Cash Advance

1. Complete the header, including the cash advance information.
2. Complete the segments, complete any expected expense, attach images, etc., as usual.
3. Submit the request as usual.
   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 simply by clearing the cash advance fields on the request header.

View Requests

To view a request, either:

- Click the Open Requests tile in the My Tasks area on the home page. - or -
- On the menu, click Requests. The Manage Requests page appears.
  - The request list appears.

Click a request to view and edit

Copy a Request

1. On the Manage Requests page, select the desired request.
2. Click Copy Request. 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 resulting request to be the source request end date plus one day. You can set the start date, if desired.
   - Indicate whether or not to copy expected expenses, segments, and cash advances.

Edit a Request
Approved Requests may not be edited.
To edit a Request that has not been submitted:
1. To open the request, either:
   - Click the Open Requests tile in the Quick Task Bar on the home page. - or -
   - On the menu, select Requests > Manage Requests (on the sub-menu). The request list appears.
2. Click a request (anywhere on the line; not just the name) to view and edit (if applicable) a request. If the desired request does not appear in the list, choose other views using the View list, if desired.
3. Make the desired changes.
4. Click Save.

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

1. Click **Requests, Manage Requests**. Click the **Request Name.**
2. Click **Recall,** then **Yes** to confirm the recall.
3. **Cancel Request**, or make necessary changes, **Save**, and **Submit**.

Print Requests
1. Click either:
   - Click the Open Requests tile in the Quick Task Bar on the home page. - or -
   - On the menu, click Requests > Manage Requests (on the sub-menu). The request list appears.
   - Click a request (anywhere on the line; not just the name) to view and edit (if applicable) a request.
   - If the desired request does not appear in the list, choose other views using the View list, if desired.
2. On the request, click Print.

Delete a Request
To delete an un-submitted request:
1. Click either:
   - Click the Open Requests tile in the Quick Task Bar on the home page. - or -
   - On the menu, click Requests. The Manage Requests page appears.
2. Select the check box to the left of the desired request.
3. Click Delete Request.

Approve the request
To approve a request:
1. Open the desired request.
2. 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

For Further Assistance
Contact the **MSU Travel & Accounting Offices**:
- Email - concurhelp@msu.edu
- Web Inquiry – go.msu.edu/travel-changes