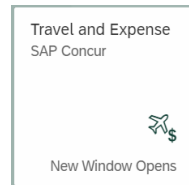


Getting Started

1. How do I log into Concur?

By logging into EBS with your net ID and password with two-factor authentication, MSU employees will have access to Concur. Once there, you will arrive at your Concur home page.



2. What if I do not have Concur on the portal or cannot login?

Users must have a profile to access. All active MSU Employees have Concur profiles. Please contact the Travel at State Project team via email at concurhelp@msu.edu if you have any questions.

3. How will I know if there is a service outage in Concur or the system is just running slowly?

If the system appears to be running slower than normal or you are receiving a timeout error, you can check messages to see if there is a service outage by going to the Concur home page, scroll to bottom of page and click on "Service Status (North America)". There you will see the current service status. In the top right corner of the screen, you can click "Subscribe to Updates" if you wish to receive updates when the system is experiencing issues.

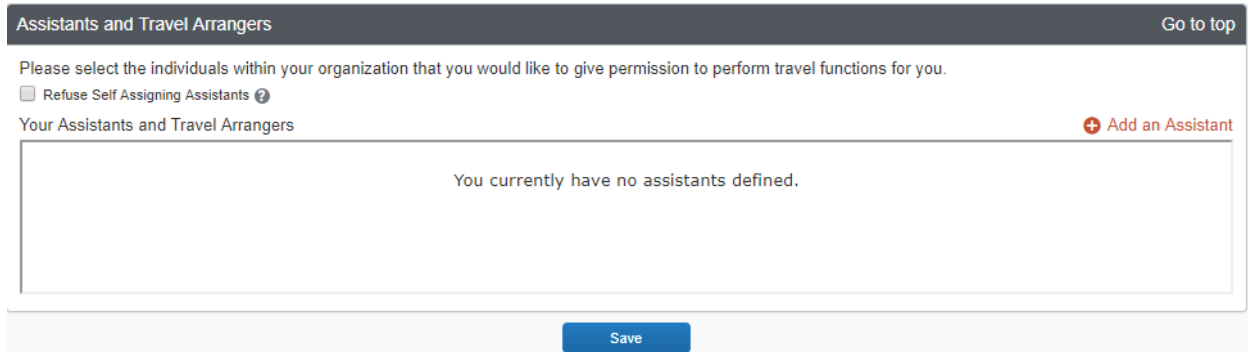
4. Why do I need a profile?

Your profile controls multiple critical functions within Concur. If you book airfare, the name in your profile must match your state/government issued ID. 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 (see instructions below). To take advantage of the mobile technology and electronic receipts, you must activate e-receipts, verify your email, and setup your mobile PIN. For additional details on profile settings, please refer to the [User Profile Settings Quick Reference Card](#).

5. How do I become an arranger or assign an arranger to make travel reservations?

Travelers are responsible for assigning travel arrangers in their Concur Profiles.

- To do so, go to Profile Settings, Travel Settings, Assistants/Arrangers;
- Select "Add an Assistant"



Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

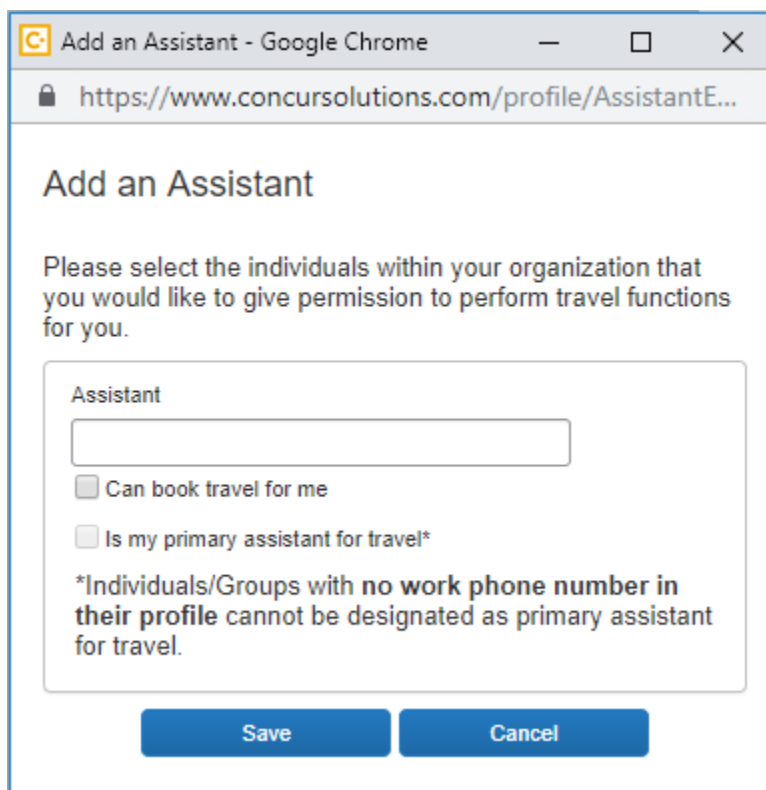
Refuse Self Assigning Assistants

Your Assistants and Travel Arrangers + Add an Assistant

You currently have no assistants defined.

Save

- Type in your Assistant's name or email address and select the appropriate boxes;
- Save.



Add an Assistant - Google Chrome

https://www.concursolutions.com/profile/AssistantE...

Add an Assistant

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Assistant

Can book travel for me

Is my primary assistant for travel*

*Individuals/Groups with no work phone number in their profile cannot be designated as primary assistant for travel.

Save Cancel

- You can add as many Assistants as you wish.
- Once complete click "Save" on the Setting page.

6. How do I become a delegate or assign a delegate to create and submit Requests, and prepare Expense Reports?

Travelers are responsible for assigning delegates to create and submit Requests, and prepare Expense Reports in Concur.

To assign delegates to prepare and submit Requests as well as prepare Expense Reports,

- Go to Profile Settings;
- Select Expense Delegates under Expense Settings to assign delegates.
- Click Add and type in the MSU employee name or email address you wish to be your delegate;

Expense Delegates

Delegates
Delegate For

Add
Save
Delete

Delegates are employees who are allowed to perform work on behalf of other employees.

Search by employee name, email address, employee id or login id

Add
Cancel

Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
No records found.									

- Select the following boxes and save:
 - can prepare requests,
 - can receive emails,
 - can prepare expense.
- You can add as many Delegates as you wish.
- Save

Delegates may not submit Expense Reports on behalf of travelers.

7. Who can make changes to a Concur profile?

A traveler can modify his/her own profile in Concur. 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*. The traveler must enter any assignment of delegation. Delegates should not update their travelers' profiles without their expressed permission.

8. Which mobile apps should I download?

The following free apps are highly recommended and are available through your device's apps store.

Concur® for Mobile makes it simple to start your Expense Report before you end your trip. This app compliments our web-based solution by allowing you to manage travel reservations and

expenses wherever you are. For approvers, Concur® for Mobile allows you to immediately approve or reject Expense Reports.

Expenself is an enhancement to the features in *Concur® for Mobile* and takes it one-step further with optical character recognition (OCR) for receipt imaging. Receipt images taken with this application will be itemized and added to the traveler's receipt library. By categorizing and populating expense reports with the receipt information, data entry for expense reconciliation is diminished. Note - keep paper receipts until expenses are reconciled to operating statements.

Triplt Pro saves you time by creating a master itinerary for your trip that is accessible anytime. *Triplt Pro* will keep your itinerary, reservations, meetings, and other trip information in one place, and makes sharing with others easy. *Triplt Pro* will also send travel alerts (e.g. boarding gate information and flight delays or cancellations).

In addition to the apps above, Concur has partnered with several suppliers to provide a host of mobile apps for travel and expense management. These additional apps are located in Concur's App Center.

*** You will need to set a Mobile PIN by logging into the Concur Application. Mobile Registration can be found under Profile – Profile Settings. For further instructions, please refer to the*

[iPhone User Guide](#) and [Android User Guide](#).