

Michigan State University employees can submit a travel authorization request in MSU’s Concur system with your requested trip expenses. Follow the below Table of Contents to manage a Travel Request in Concur.

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How to Manage an Employee Request

Create a Request

1. Start at the **Concur Homepage**, select **Start a Request**.

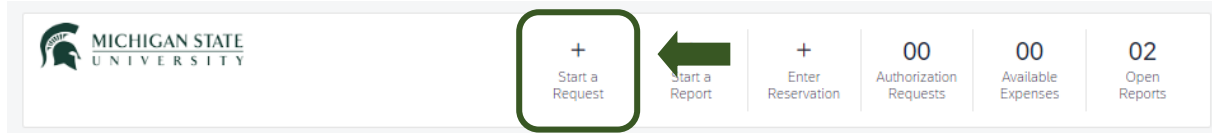


Exhibit 1

2. Fill in the necessary information and required fields indicated with a (*). Enter any additional information you would like to share with the Approver in the **Comments** field. Select **Create Request** once you are done filling in the required information.

Exhibit 2

NOTE: Anything entered in the **Request/Trip Name** field, populates the Accounting String in KFS.

3. In the **Expected Expenses** section, select **Add** and enter estimated amounts for each of your trip expenses. Select the expense types that apply. Some common expenses are *Air Ticket, Car Rental, Hotel Reservation, and Daily Meal Per Diem Allowance*.

Exhibit 3

How to Manage an Employee Request

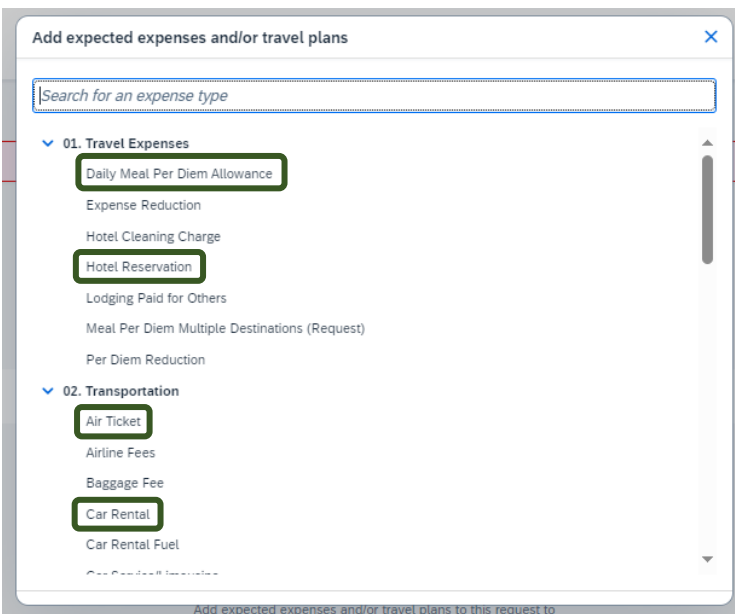


Exhibit 4

- 5. To add documents for Approvers review, select the **Attachments** dropdown menu
 - >**Attach Documents**
 - >**Upload and Attach**
 - >double click the file you want to upload.

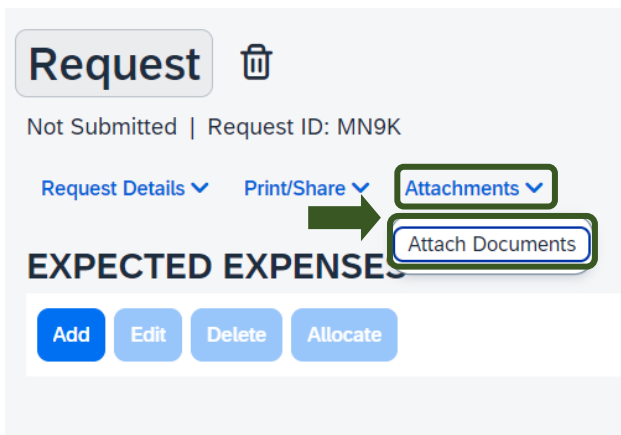


Exhibit 5

NOTE: Preferred attachment formats are JPEG or PDF.

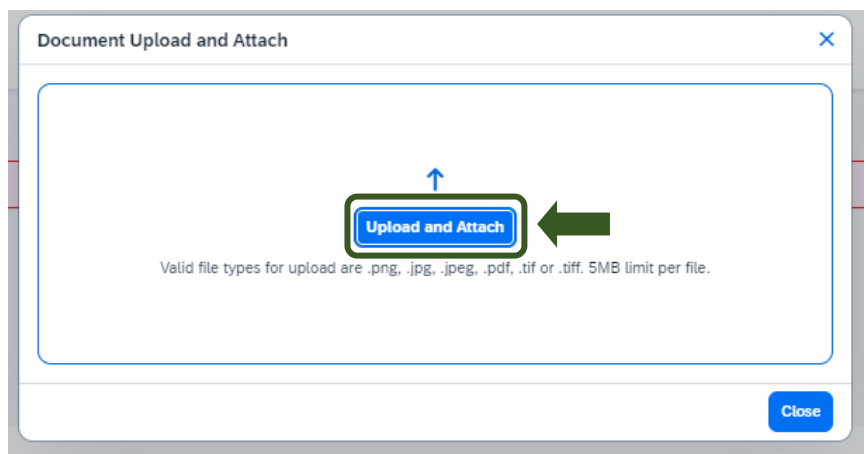


Exhibit 6

How to Manage an Employee Request

6. The red folder icon will indicate the file is uploaded for your Approvers review.

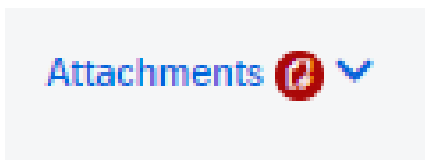


Exhibit 7

7. When you have completed all your Expected Expenses and your Request is ready, select **Submit Request**.

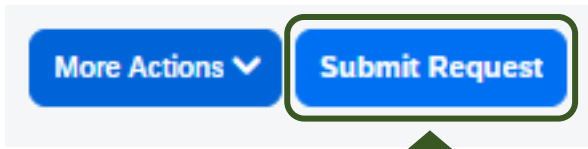


Exhibit 8

8. Select **Accept and Continue** to send the Request to your Approver.

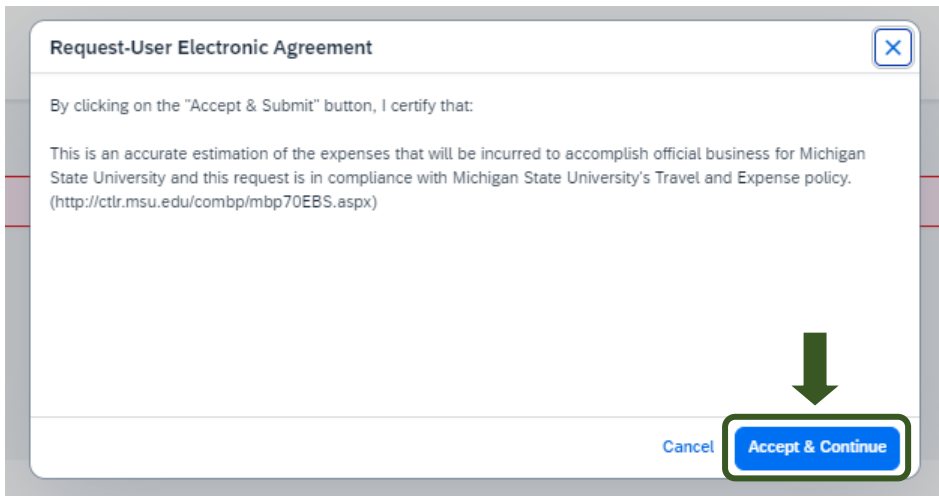


Exhibit 9

NOTE: New features in the submitted Request tile display the Request ID and the name of the individual that is pending to grant approval.

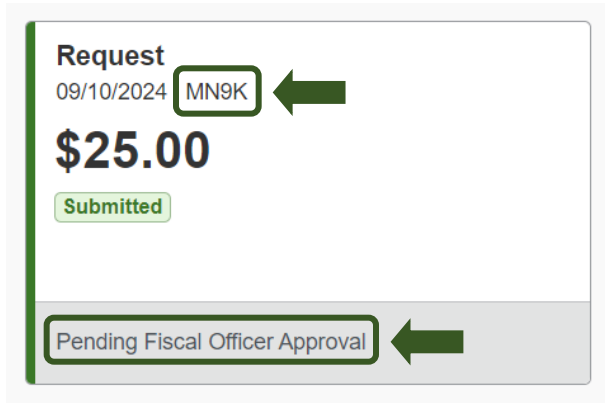


Exhibit 10

How to Manage an Employee Request

Copy a Request

1. Start at the Concur Homepage, select **Home >Requests**.

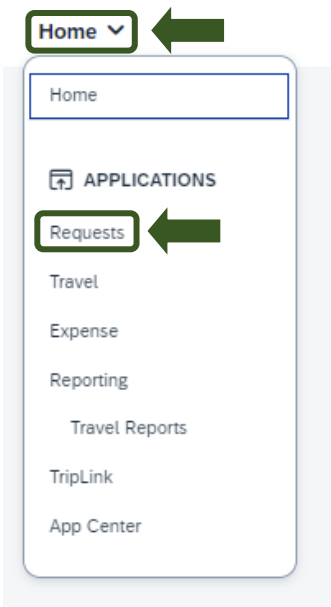


Exhibit 11

2. Select the Request you would like to add an Approver to.

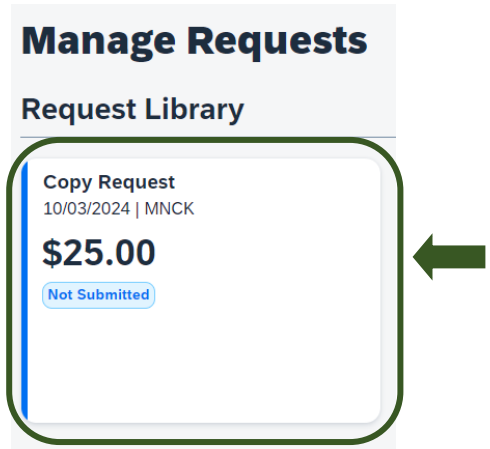


Exhibit 12

3. Select the **More Actions** dropdown menu >**Copy Request**.

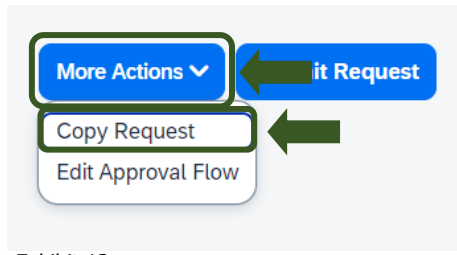


Exhibit 13

How to Manage an Employee Request

3. By default, the system provides a New Request Name for the copy. Change it, if desired
>Indicate whether to copy Expected Expenses
>**Create New Request.**

Copy Request

New Request Name *
Copy of Copy Request

Starting Date For New Request (Last Date of Source Request: 10/10/2024) *
10/10/2024

Include:
 Expenses

Cancel Create New Request

Exhibit 14

5. If you need to edit the dates for your Copy Request, once you **Create New Request**, select **Request Details**
>**Edit Request Header.**

Request Details ▾

Request

Edit Request Header

Request Timeline

Audit Trail

Linked Add-ons

Add Cash Advance

Exhibit 15

6. When you have completed all your edits in the Copy Request, select **Submit Request.**

More Actions ▾ Submit Request

Exhibit 16

7. Select **Accept and Continue** to send the Request to your Approver.

Request-User Electronic Agreement

By clicking on the "Accept & Submit" button, I certify that:

This is an accurate estimation of the expenses that will be incurred to accomplish official business for Michigan State University and this request is in compliance with Michigan State University's Travel and Expense policy. (http://ctr.msu.edu/combp/mbp70EBS.aspx)

Cancel Accept & Continue

Exhibit 17

How to Manage an Employee Request

NOTE: New features in the submitted Request tile display the Request ID and the name of the individual that is pending to grant approval.

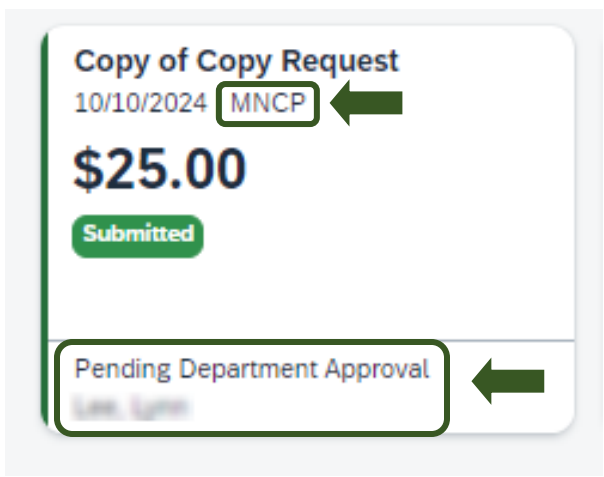


Exhibit 18

How to Manage an Employee Request

Delete a Request

NOTE: If your Request was already submitted, please refer to the **Recall a Request** for instructions.

- 1. To delete a not submitted Request, start at the **Concur Homepage** and select **Home**
- > **Requests**
- > Request you wish to delete.

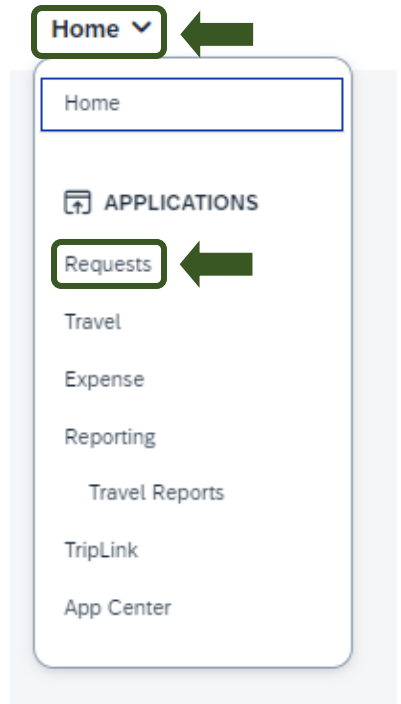


Exhibit 19

- 2. Select the **Trash Can**
- > **Yes**.



Exhibit 20

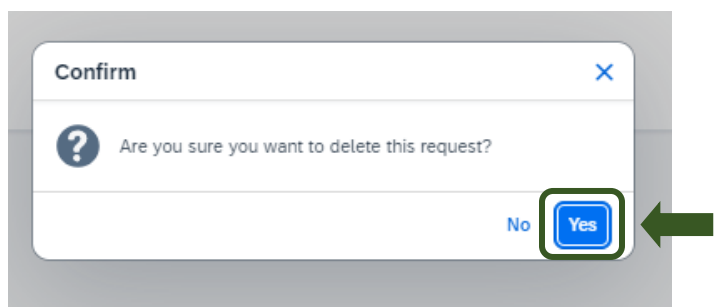


Exhibit 21

How to Manage an Employee Request

Recall a Request

You cannot change, cancel, or delete a Request that is in submitted status unless you recall it first.

- 1. Start at the **Concur Homepage**, select **Home**
> **Requests**
> Request you wish to recall.

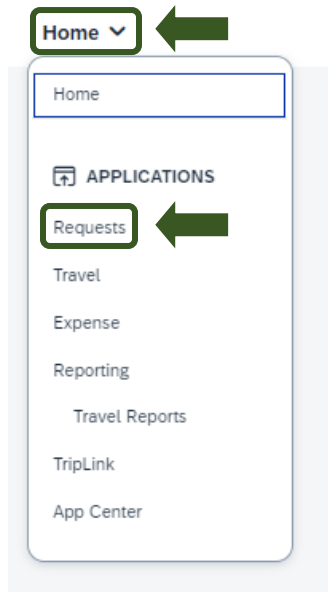


Exhibit 22

- 2. Select the **More Actions** dropdown menu
> **Recall**
> **Yes**.

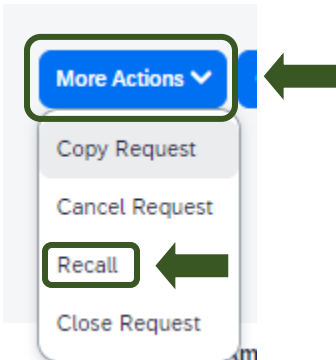


Exhibit 23

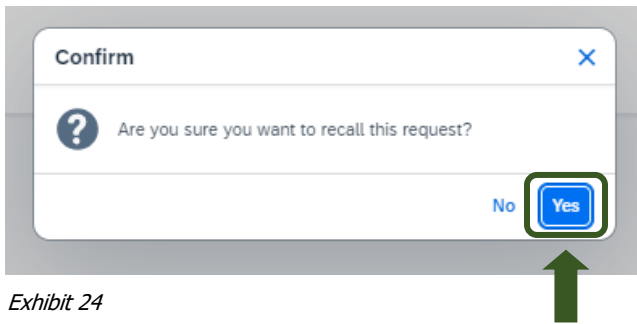


Exhibit 24

How to Manage an Employee Request

3. When you have completed all your edits in the Recalled Request and your Request is ready, select **Submit Request**.

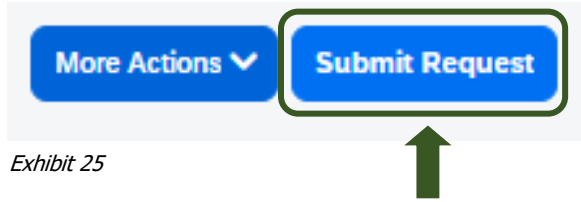


Exhibit 25

4. Select **Accept and Continue** to send the Request to the Approver.

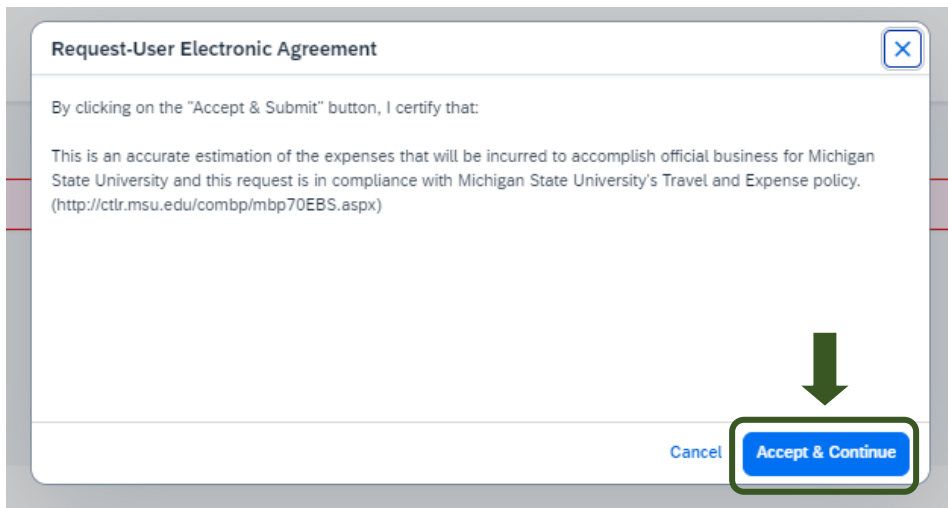


Exhibit 26

NOTE: New features in the submitted Request tile display the Request ID and the name of the individual that is pending to grant approval.

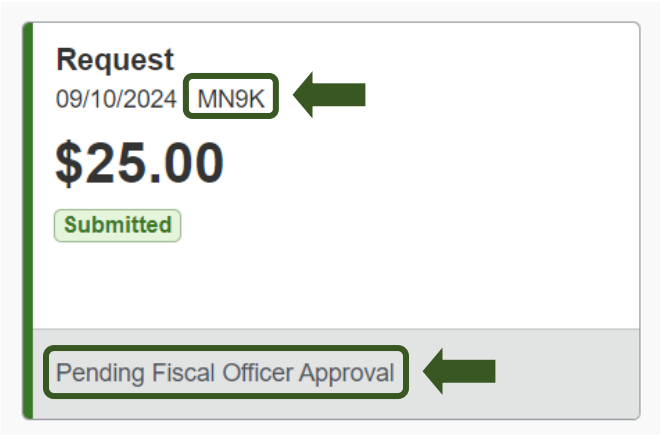


Exhibit 27

How to Manage an Employee Request

Edit a Request

1. Start at the **Concur Homepage**, select **Home**
>**Requests**
>Request you wish to edit.

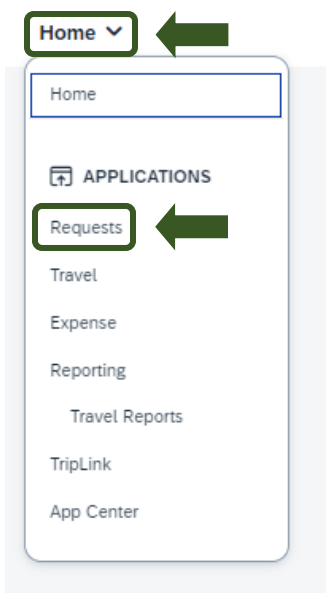


Exhibit 28

2. To edit Request Header, select the **Request Details** dropdown menu
>**Edit Request Header**
>Make the changes and select **Save**.

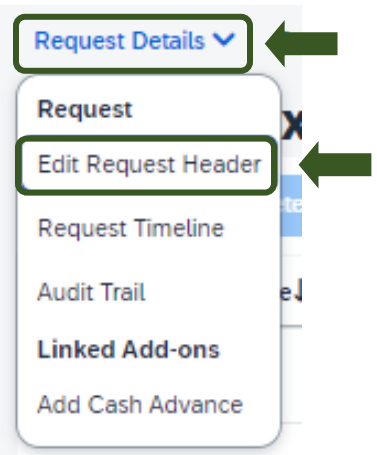


Exhibit 29

3. To edit Expected Expenses, click on the box next to the **Expense Type**
>Select **Edit**
>Make the changes and select **Save**.

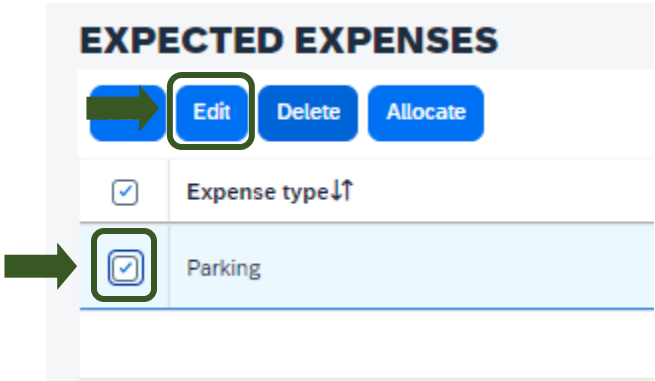


Exhibit 30

How to Manage an Employee Request

4. When you have completed all your edits in the Request, select **Submit Request**.

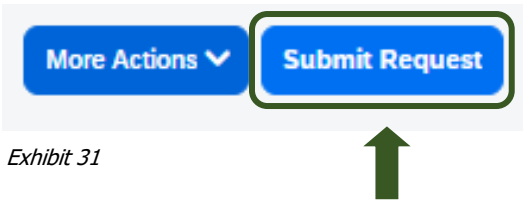


Exhibit 31

5. Select **Accept and Continue** to send the Request to the Approver.

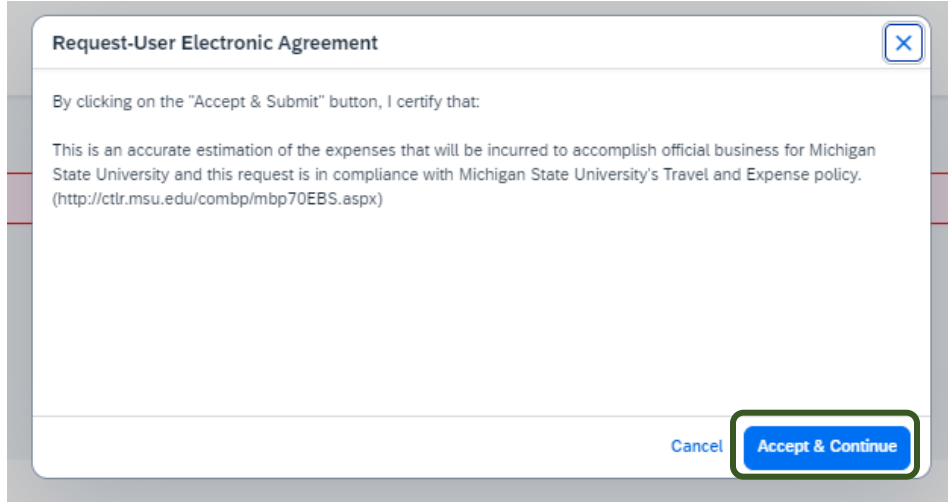


Exhibit 32

NOTE: New features in the submitted Request tile display the Request ID and the name of the individual that is pending to grant approval.

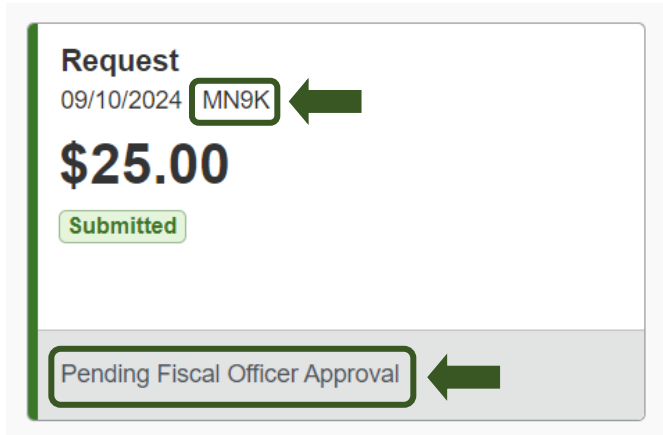


Exhibit 33

How to Manage an Employee Request

Print a Request

1. Start at the **Concur Homepage**, select **Home > Requests**
>Request you wish to print.

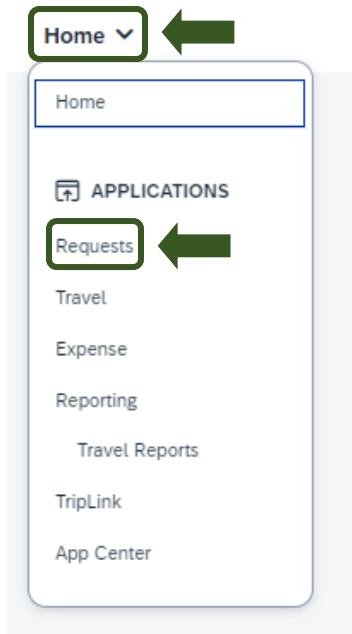


Exhibit 34

2. Select **Print/Share >MSU-Request Printed Report.**

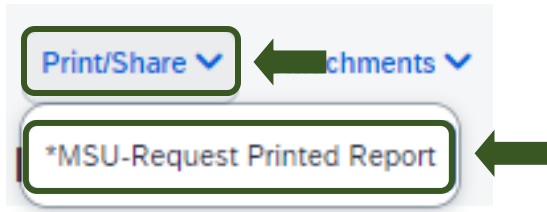


Exhibit 35

3. There will be the options to Print, Save as PDF, or Email.

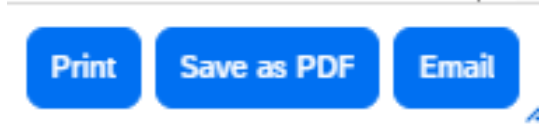


Exhibit 36

How to Manage an Employee Request

Close Request

Requests do not close based on processing Expense Reports, either the traveler closes the Request when they want, or 94 days after the Trip End Date, it closes automatically. To manually close a Request, follow below.

1. Start at the **Concur Homepage**, select **Home**
>**Requests**
>Request you wish to close.

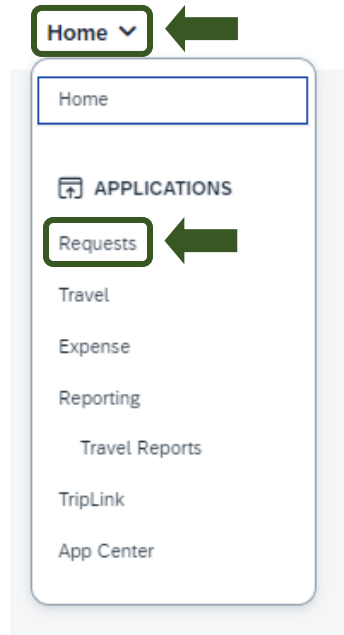


Exhibit 37

2. Select the **More Actions** dropdown menu
>**Close Request**
>**Yes** to confirm.

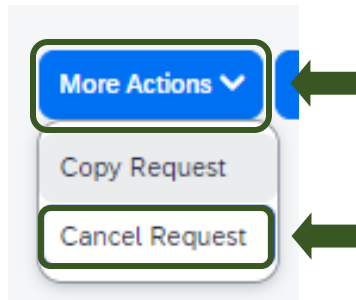


Exhibit 38

3. The Confirmation note will appear, select **OK**.

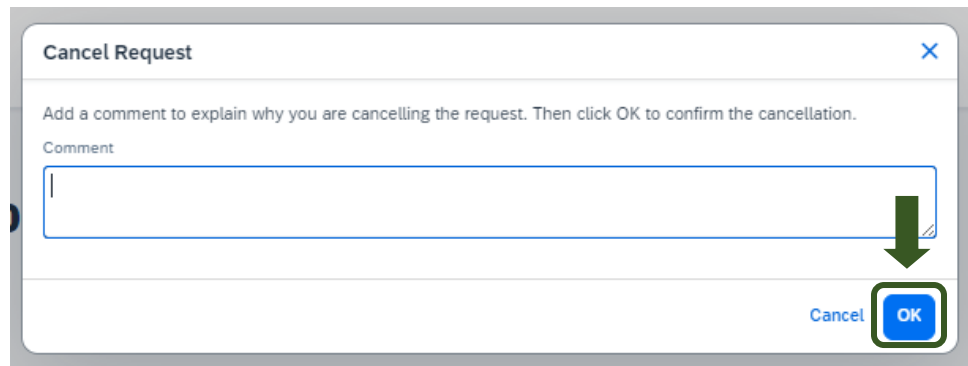


Exhibit 39

How to Manage an Employee Request

Request Cash Advance

1. Start at the **Concur Homepage**, select **Start a Request**.

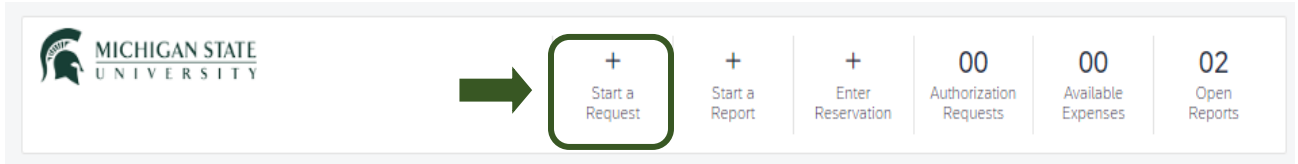


Exhibit 40

OR

Start at the **Concur Homepage**, select **Home > Requests > Create New Request** or previously created Request.

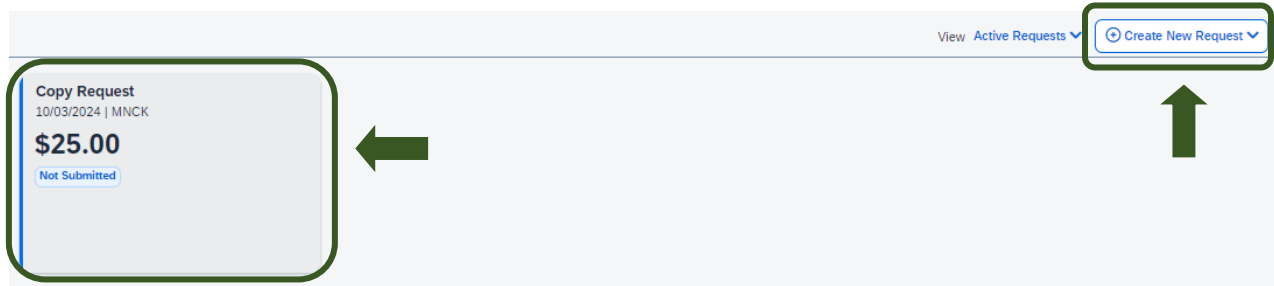


Exhibit 41

2. Within the Request, select the **Request Details** dropdown menu > **Add Cash Advance** (under Linked Add-ons).

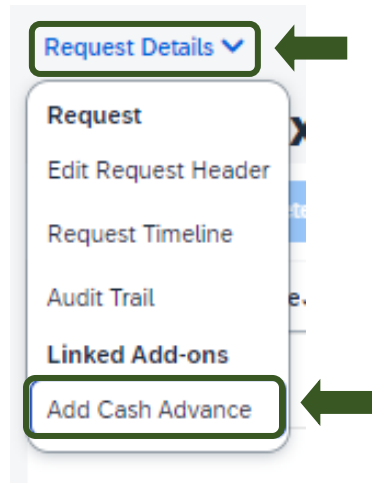


Exhibit 42

How to Manage an Employee Request

3. Add the Cash Advance Amount, Currency, and any Comments >**Save**.

The screenshot shows a web form titled "Copy Request". At the top right, there are three buttons: "Cancel", "Save", and "Submit". The "Save" button is highlighted with a green square and a green arrow pointing up to it. Below the buttons, there are two tabs: "Details" (selected) and "Expenses". The "Details" tab contains two input fields: "Cash Advance Amount" with an asterisk and a question mark icon, and "Currency" with an asterisk and a dropdown menu showing "US, Dollar". A green box highlights both input fields, with a green arrow pointing left to the "Cash Advance Amount" field. Below these fields is a large text area labeled "Cash Advance Comment" with a character count of "0/2000". A small asterisk and "Required field" text are visible in the top right corner of the form area.

Exhibit 43

4. Cash Advance is approved when Request is submitted, and approval is final.

The screenshot shows a summary box with a blue border. Inside the box, the text reads: "CASH ADVANCES: 1" in bold, followed by "Amount" and "\$300.00".

Exhibit 44

How to Manage an Employee Request

Delete Cash Advance

1. If you have not yet submitted the request, you can remove the Cash Advance by selecting the Request > **Cash Advances**.



Exhibit 45

2. Select the **Trash Can**.

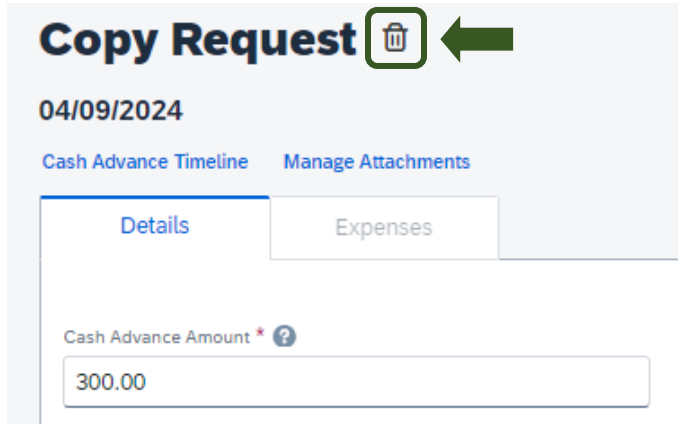


Exhibit 46

How to Manage an Employee Request

Link Request to Expense Report

- 1. Start at the **Concur Homepage**, select **Home > Requests**
- >Request you wish to link.

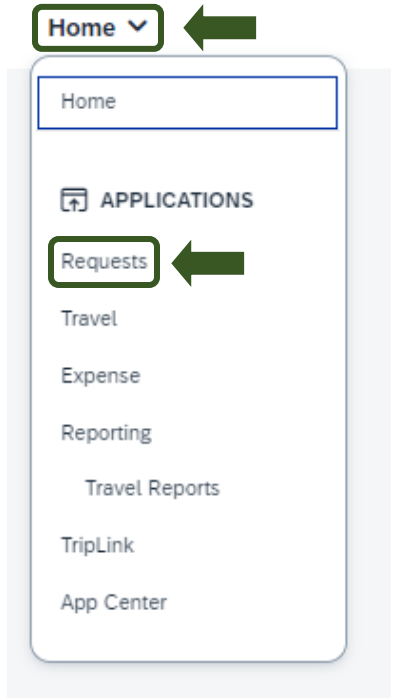


Exhibit 47

- 2. Click **Create Expense Report**. You will then be brought to the Expense Report screen where you can fill out the Report Details and Expenses incurred while traveling.

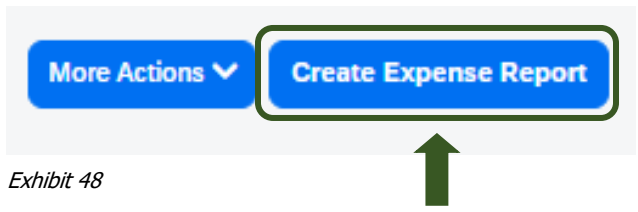




Exhibit 48

How to Manage an Employee Request

Common Alerts in Request

This chart will show the types of warnings or errors that would be presented.

 Warning	 Error
Trip start date is in the past.	Travel is MSU funded; please add the account number.
Please verify: Segment departure and arrival dates are not within the Request header start and end dates.	Travel is not MSU funded; please remove the account number.
Please verify: Segment departure date is in the past.	Please remove the Cash Advance as this travel is not MSU funded.
Secondary Trip Purpose must be different.	The Per Diem/Expense Reduction must be a negative amount. Please return to the expense and adjust accordingly.
This Request was submitted by a delegate.	Requests cannot be entered with a Trip End date greater than 120 days in the past.
This Request includes a Cash Advance. Approval of this Request also approves the Cash Advance.	You requested a Cash Advance amount greater than projected expenses (airfare not included).
This Request was approved by a delegate.	The cash advance must be in US Dollars currency.
There are attachments available for viewing.	The Request has no Segments or Expenses. You must create at least one entry to submit the Request.
	The Request has no Segments and is an international trip type. You must create at least one entry within the Segments tab to submit the Request.

NOTE: The following list reflects other common Warning's

Combined business and personal travel may require airfare quote at time of booking from the MSU Preferred Travel Agencies. See MBP Section 70 for details.
University Owned Vehicle (Motor Pool) is used to request approval to use a Motor Pool vehicle. This will NOT create a reservation. Please contact Transportation Services to reserve a vehicle upon approval of your request.
Faculty, staff or graduate student travelers are eligible for a cash advance for international travel only. If exception is needed for domestic travel, a hardship letter must be attached in the attachments area of the request.
Please note that all faculty, staff, and students traveling on MSU sponsored international travel (non-education abroad) must register their travel in the MSU Global Travel Registry before departure.