



MISSISSIPPI STATE
UNIVERSITY™

TRAVEL SERVICES



Concur Request User Guide

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What is Concur?

Concur is an online tool that fully integrates all aspects of preparing for and processing travel for Mississippi State University employees and students. Concur allows for electronic processing for all travel requests, travel reservations, and travel reimbursements.

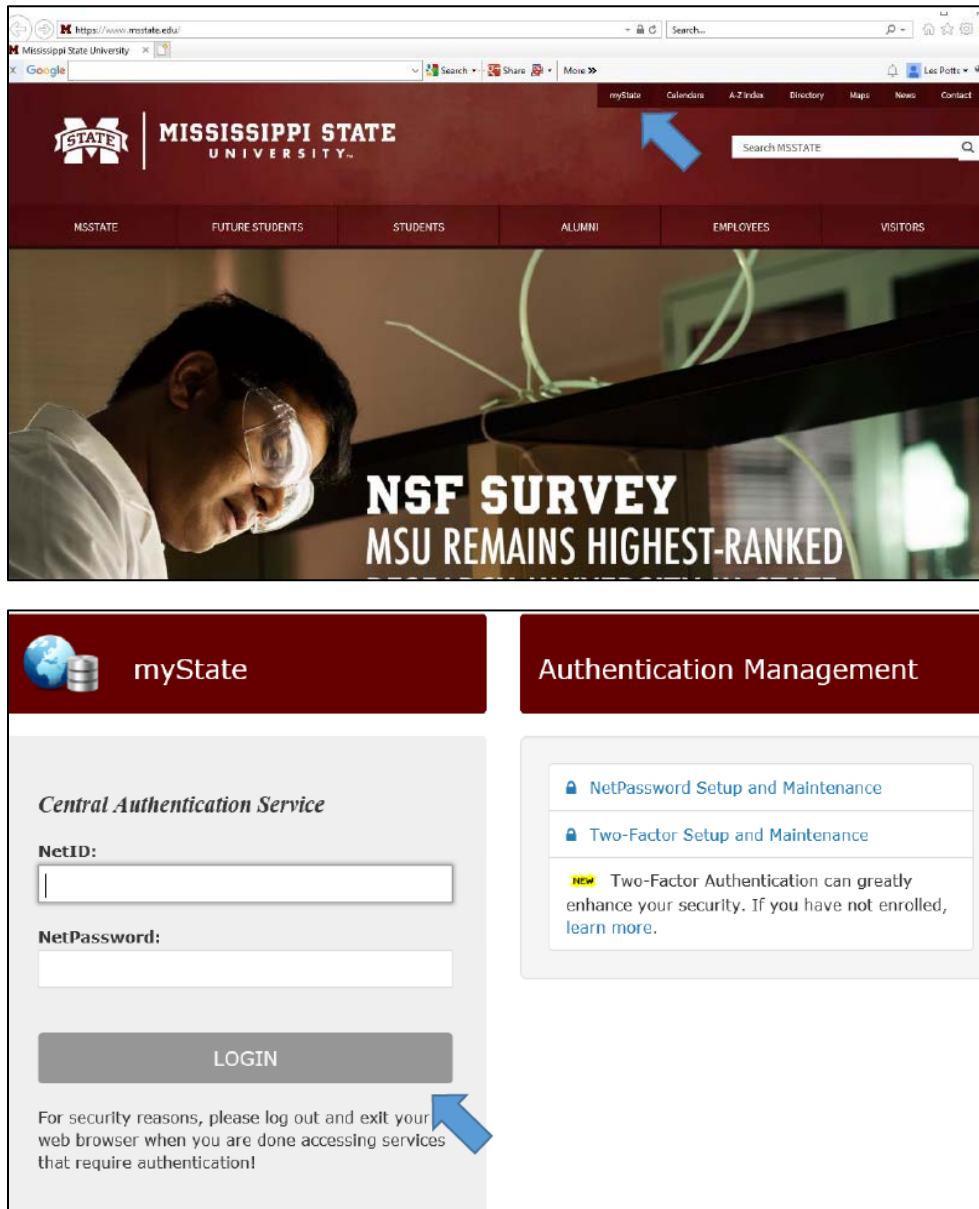
Concur Modules

- Request
 - Concur Request should be used to create a report of estimated costs for a potential trip that will be forwarded to the traveler's next higher administrator for approval/disapproval.
 - If the traveler needs a cash advance, he/she should enter the cash advance within the request prior to submitting the request for approval/disapproval. Once the request is approved by the next higher administrator, the cash advance will go to Travel Services to be issued. If the traveler is Self-Booking in Concur, the cash advance will go to Travel Services to be issued after he/she completes the booking.
NOTE: If the traveler does not include the cash advance within the request, he/she will not be able to receive an advance for that trip.
 - The Request module replaces Section C signatures on the MSU A-03; a request should be created in any instance in which you would need permission to travel (out-of-state, conference, seminar, annual meeting, cash advance).
- Travel
 - The Travel module is used to reserve air/rail, hotel, and car once the Request to travel has been approved by the next higher administrator.
 - The Travel module gives individuals an online view of Travel Leaders inventory. Selections made are strictly reservations. A representative from Travel Leaders will complete all bookings.
- Expense
 - The Expense module is used to create a report with all actual expenses incurred while traveling on behalf of MSU. This report will be forwarded to the traveler's next higher administrator for approval/disapproval prior to being sent to Travel Services for final approval/disapproval.
 - The Expense module replaces Sections D-H on the MSU A-03.



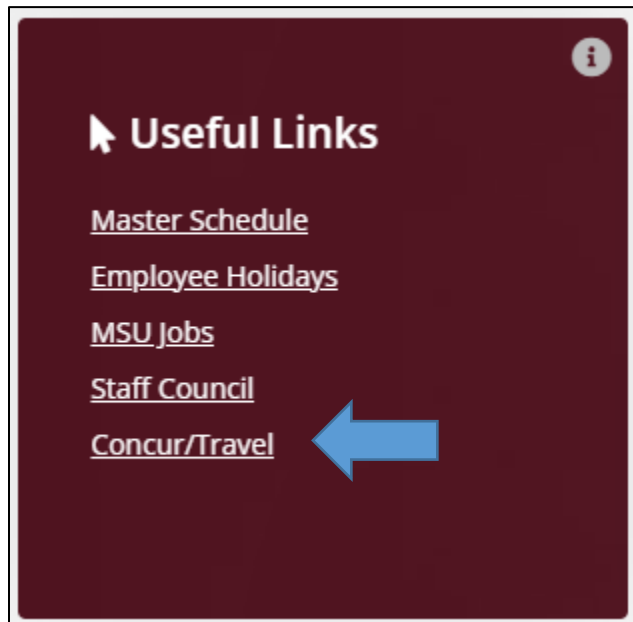
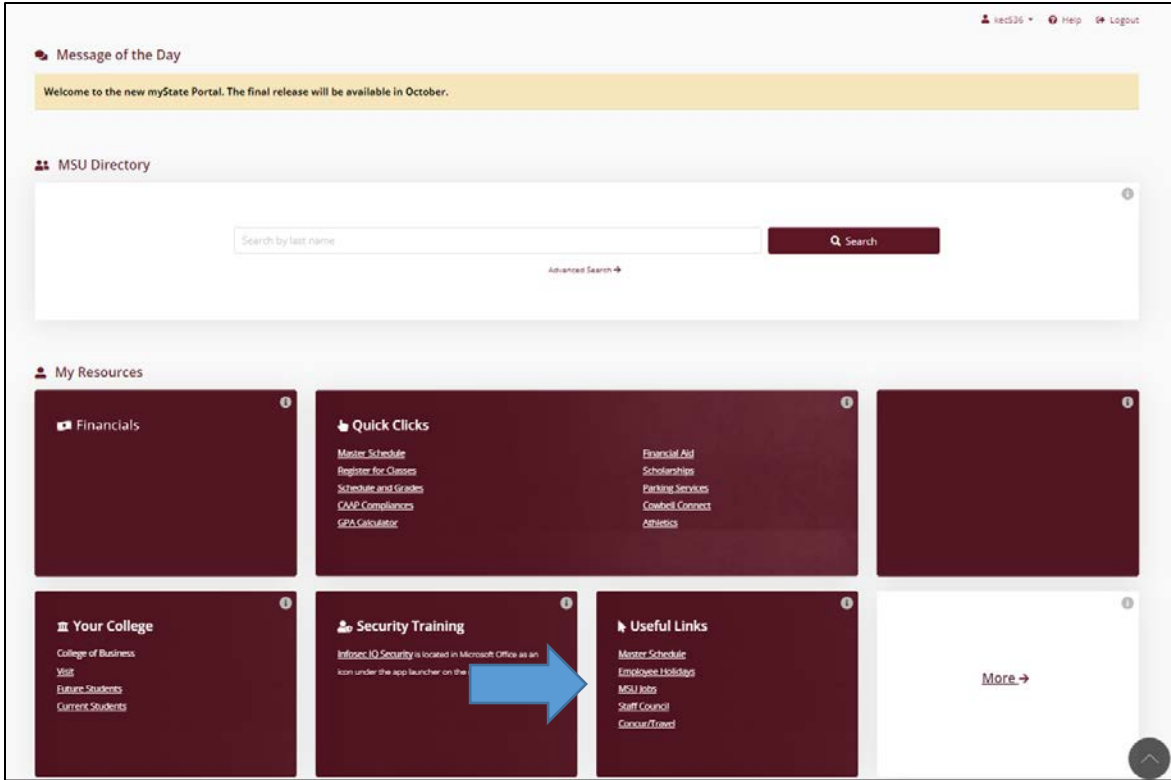
Logging in to Concur

- From the MSU homepage, select myState, and sign in with your NetID and NetPassword.



The screenshot shows the Mississippi State University homepage. At the top, there is a navigation bar with the MSU logo and the text "MISSISSIPPI STATE UNIVERSITY". A blue arrow points to the "myState" link in the navigation bar. Below the navigation bar is a search bar and a menu with links for "MSSTATE", "FUTURE STUDENTS", "STUDENTS", "ALUMNI", "EMPLOYEES", and "VISITORS". The main content area features a large banner image of a person wearing safety glasses, with the text "NSF SURVEY MSU REMAINS HIGHEST-RANKED". Below the banner is a "myState" login portal. The portal has a header with the "myState" logo and the text "Authentication Management". The main content area is divided into two columns. The left column is titled "Central Authentication Service" and contains a "NetID:" field, a "NetPassword:" field, and a "LOGIN" button. A blue arrow points to the "LOGIN" button. Below the login fields is a security notice: "For security reasons, please log out and exit your web browser when you are done accessing services that require authentication!". The right column contains a "NetPassword Setup and Maintenance" link, a "Two-Factor Setup and Maintenance" link, and a "Two-Factor Authentication" notice with a "learn more" link.

- Complete the Two-Factor Authentication by the push notification on your cell phone or the token provided by MSU.
- Once Two-Factor Authentication is completed, you will be sent to the myState homepage.
- Under **My Resources**, scroll to the **Useful Links** section and click **Concur/Travel**.



Exploring the Home Page

The home page contains the following sections. To return to the home page from any other page, click the SAP Concur logo on the top left of the screen.

Section	Description
Trip Search	This section provides the tools you search for quotes for upcoming trips: Flight: Use to search for flight quotes. Car, Hotel, or Rail: Use to search for hotel quotes, rental car quotes, and rail quotes. **If searching for multiple segment quotes (ex: air and car, car and hotel, etc.), search for them one at a time. Retrieve the first segment quote amount and go back to the home page and trip search box to search for the next segment quote. Remember, when searching for segments in Concur, you are viewing live inventory. If you see "Next" at the bottom right when searching for quotes, DO NOT CLICK. This pulls the actual reservation from the airline, hotel, etc.
Alerts	This section displays informational alerts about Travel features.
Company Notes	Content is provided by Travel Services.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists Required Approvals, Available Expenses, and Open Reports.

The screenshot shows the SAP Concur home page interface. At the top, there is a navigation bar with the MSU logo and several utility buttons: '+ Start a Request', '+ Start a Report', '+ Upload Receipts', '01 Authorization Requests', '00 Available Expenses', and '01 Open Reports'. Below this, the main content area is divided into several sections, each highlighted with a red box in the image:

- Trip Search:** Contains a search form with options for 'Round Trip', 'One Way', and 'Multi City'. It includes fields for 'From' (Departure city, airport or train station) and 'To' (Arrival city, airport or train station), along with a 'Search' button and a 'Show More' link.
- Alerts:** Displays a list of alerts, including one about connecting a Concur account to Tript and another about signing up for e-receipts.
- Company Notes:** Features a 'WELCOME TO MSU's ONLINE TRAVEL SYSTEM' message and a 'TRAVEL CONSIDERATIONS' section with a warning: '**PRIOR TO BOOKING TRAVEL, as well as prior to actual travel, all employees are urged to review the...'
- My Tasks:** Shows a summary of tasks: '01 Open Requests' (with a sub-task for Clark_Pittsburgh,PA_05/01/20 for \$1,449.65), '00 Available Expenses' (with a note that there are no available expenses), and '01 Open Reports' (with a sub-report for Clark_G.Shores/Mobile,AL... for \$2,255.71).
- My Trips (0):** Indicates that there are currently no upcoming trips.



Creating and Submitting a Request

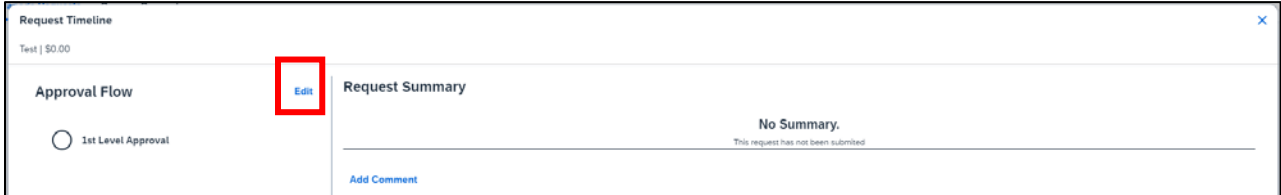
1. Click the **Home** dropdown menu (upper-left hand corner) and select **Requests**.
2. Click **Create New Request**.
3. Fill in all required fields in the **Request Header**.
 - How will you book your trip? field:
 - **Self-booked in Concur Travel:** employee or travel arranger will be booking segments (air, hotel, car) in Concur.
 - **NOTE:** The inventory seen in Concur belongs to Travel Leaders. Booking in Concur is booking through Travel Leaders.
 - **Agency-booked: employee will be contacting Travel Leaders by phone or email.**
 - **Non-Agency Request: employee will not be using Travel Leaders to book segments (air, hotel, car).**
 - **Example:** conference hotel, host paying for airfare, etc.
4. If a cash advance is needed, the complete the **Request Header** then click **Request Details** and **Add Cash Advance**.
5. To add estimated expenses and estimated amounts for each segment (air, car rental, and hotel) that you wish to book online through Travel Leaders, click **Add**. A window will appear with a list of expense types and segment types.
 - Segment types are:
 - Hotel Reservation ***NOT "HOTEL"***
 - Air Ticket
 - Car Rental
 - Railway Ticket

If you plan to book in Concur Travel, the appropriate segment types listed above must be included in your request with accurate estimated amounts. **Note that the correct segment to book a hotel through Concur Travel is Hotel Reservation, not Hotel.** The quote amounts can be retrieved from using the **Trip Search** box on the home page of Concur. For more information on how to retrieve a quote, refer to the Concur Travel User Guide.

6. If there are additional estimated expenses, click the **Add** button and select the appropriate expense. Fill in the required fields that appear in the **New Expense** window and click **Save**.
7. After all the estimated expenses have been entered into the request, click on the **Request Details > Request Timeline**.

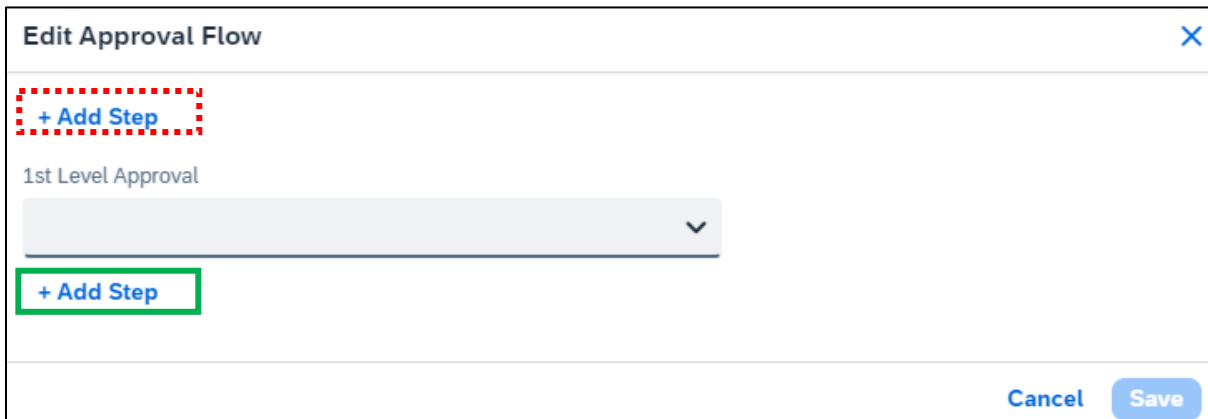


8. Click the **Edit** link next to **Approval Flow**.



9. In the **Edit Approval Flow** window, enter the name of the approver who needs to review the request.

- Begin typing the first letters of his/her last name, and a dropdown box will appear showing names of individuals to choose from.
- Find the correct approver and click on his/her name in the populated dropdown box.
 - **Note: please be patient and wait for Concur to populate the approvers name. It is important to make sure you are selecting the name in the drop-down box by clicking with your cursor.**
- If there is more than one person to approve, after entering the first approver, click the **+Add Step** button. This will add a **User-Added Approver** field. Type the additional approver's name in the field and select from the drop-down list.
 - Selecting +Add Step above 1st Level Approval (Red/dotted box in screenshot below) will add in a **User-Added Approver** field before the 1st Level Approval.
 - Selecting +Add Step below 1st Level Approval (Green/solid box in screenshot below) will add in a **User-Added Approver** field before the 1st Level Approval.



10. Once the appropriate approver(s) has been selected click the **Save** button and click **Close**.

Edit Approval Flow ✕

[+ Add Step](#)

1st Level Approval

Approver, Approver (testusers@msstate.edu) ▼

[+ Add Step](#)

[Cancel](#) [Save](#)

11. Click the **Submit Request** button.

SAP Concur Requests ▼

Manage Requests

Test \$1,580.00 ✕

Not Submitted | Request ID: CHCR [Edit Approval Flow](#) [Submit Request](#)

[Request Details](#) [Print/Share](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts↑↓	Expense type↑↓	Details↑↓	Date↓↑	Amount↑↓	Requested↑↓
<input type="checkbox"/>		Air Ticket	Jackson (JAN) - Pittsburgh (PIT) : Round Trip	08/15/2023	\$400.00	\$400.00
<input type="checkbox"/>		Hotel	Pittsburgh, Pennsylvania	08/15/2023	\$800.00	\$800.00
<input type="checkbox"/>		Meal Cost	Pittsburgh, Pennsylvania	08/15/2023	\$280.00	\$280.00
<input type="checkbox"/>		Taxi/Shuttles		08/15/2023	\$100.00	\$100.00
						\$1,580.00



Requesting a Cash Advance

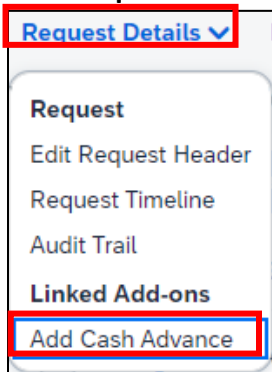
1. Complete the **Request Header** of the Request you are entering and click **Create Request**.

The screenshot shows the 'Create New Request' form with the following fields and values:

- Request Policy: *MSU-Policy - RQ to Travel
- Request/Trip Name: (empty)
- Travelers 9-Digit MSU ID #: 999999999
- How will you book your trip?: None Selected
- Request/Trip Start Date: MM/DD/YYYY
- Request/Trip End Date: MM/DD/YYYY
- Destination City: (empty)
- Destination Country: Search by Country/Region
- Traveler Type: Staff
- Trip Type: None Selected
- Is this Group Travel - See tool tip: None Selected
- Nature of Univ. Business: None Selected
- Mode of Transportation: (empty)
- Fund: (empty)
- Org: (470400) Travel
- Program: (empty)
- Activity Code (if Required): (empty)
- Division: (BSA) Finance
- Purpose of Trip: (empty)
- Comment: (empty)

A red box highlights the 'Create Request' button at the bottom right.

2. Click **Request Details** > **Add Cash Advance** within the Request.



3. Enter the amount needed in the **Cash Advance Amount** field.
4. Enter what the advance will be used for in the **Cash Advance Comment** field.
5. Click **Save**.

The screenshot shows the 'Cash Advance' form for 'Clark_Pittsburgh,PA_08/15/2023'. The form contains the following fields and values:

- Cash Advance Amount: (empty, highlighted with a red box)
- Currency: US, Dollar
- Travel Start Date: 08/15/2023
- Travel End Date: 08/19/2023
- Cash Advance Comment: (empty, highlighted with a red box)

A red box highlights the 'Submit' button at the top right.



6. Add other **Expenses** as needed and click **Submit Request**.

Booking an Approved Request

1. Click the **Requests** tab at the top.
2. Click the approved **Request Name** you want to open.
3. Click **Book** at the top right.
4. Click **Proceed to Booking**.

For specific information on completing a booking in Concur, please refer to the Concur Travel User Guide.

