



# **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 is currently only to be used for domestic travel.\*\***

## Concur Modules

- Request
  - Concur Request should be used to create a report showing an estimated cost of a potential trip that will be forwarded to the traveler's next higher administrator for approval/disapproval prior to be sent to Travel Services for final approval/disapproval (if a cash advance is involved).
  - 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 travelers 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 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 on to Concur

To log on to Concur:

1. In the **User Name** field, enter your email address (netid@msstate.edu).
2. In the **Password** field, enter your NetPassword.
3. Click **Sign In**.
  - Your password is case sensitive.
  - If you are not sure how to log on, contact Amber Brazil ([abrazil@travel.msstate.edu](mailto:abrazil@travel.msstate.edu)) or Sharon Carr ([scarr@travel.msstate.edu](mailto:scarr@travel.msstate.edu)).

CONCUR

### Sign In

User Name

Password

Remember user name on this computer

**Sign In**

[Forgot your user name?](#)  
[Forgot your password?](#)

Change language  
English (US) ▼

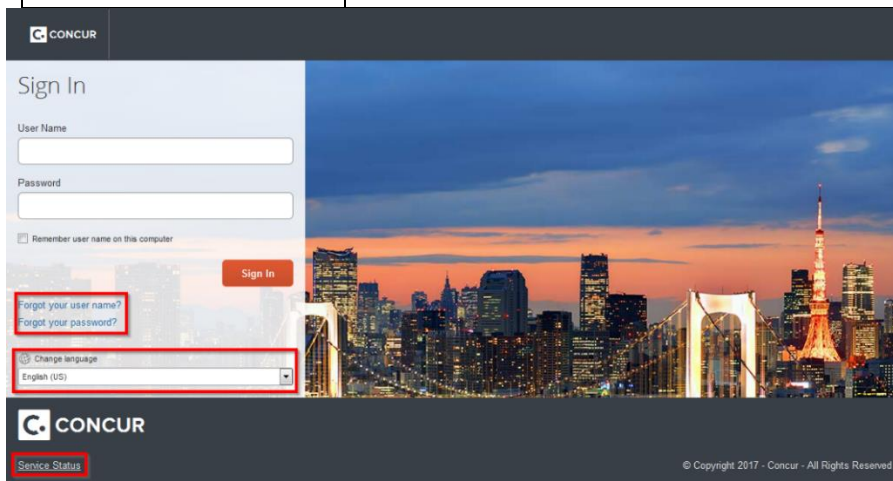
CONCUR

[Service Status](#)

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## Exploring the Sign In Page

Section	Description
Forgot your user name?	<p>This section will let the system send your user name in the email address that was set-up in your profile.</p> <p>Note:</p> <ul style="list-style-type: none"> <li>• If you do not see the email in your inbox, please check your spam or junk folder.</li> <li>• If you do not receive any email, please contact Amber Brazil (<a href="mailto:abrazil@travel.msstate.edu">abrazil@travel.msstate.edu</a>) or Sharon Carr (<a href="mailto:scarr@travel.msstate.edu">scarr@travel.msstate.edu</a>).</li> </ul>
Forgot your password?	<p>This section will let the system send the following in the email address that was set-up in your profile:</p> <ul style="list-style-type: none"> <li>• Your password hint (if you provided a password hint) - or -</li> <li>• Link to reset your password.</li> </ul> <p>Note:</p> <ul style="list-style-type: none"> <li>• If you do not see the email in your inbox, please check your spam or junk folder.</li> <li>• If you do not receive any email, please contact Amber Brazil (<a href="mailto:abrazil@travel.msstate.edu">abrazil@travel.msstate.edu</a>) or Sharon Carr (<a href="mailto:scarr@travel.msstate.edu">scarr@travel.msstate.edu</a>).</li> </ul>
Change Language	<p>This section allows you to change the language of your Concur Account to your native language.</p>
Service Status	<p>This section provides you an up-to-the-minute service availability and performance information. This will be helpful if you encounter a sudden system issue. [Example: Slow response, etc.]</p>



## Exploring the Home Page

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

Section	Description
Trip Search	This section provides the tools you need to book a trip with any or all of these: <b>Flight:</b> Use to book a flight. You can also book hotel and reserve a car at the same time. <b>Car, Hotel, or Rail:</b> Use to book hotels, reserve rental cars, etc. if not including them while booking a flight ( <b>Flight</b> tab).
Alerts	This section displays informational alerts about Travel features.
Company Notes	Content is provided by your company administrator.
My Trips	This section lists your upcoming trips.
My Tasks	This section lists <b>Required Approvals</b> , <b>Available Expenses</b> , and <b>Open Reports</b> .
Facts & Stats	Helpful travel tools.

The screenshot shows the Concur home page interface. At the top, there is a navigation bar with 'CONCUR' logo and menu items: Requests, Travel, Expense, Invoice, Approvals, App Center, and Profile. Below the navigation bar, there are statistics: 09 New Authorization Requests, 01 Purchase Requests, 42 Available Expenses, and 31 Open Reports. The main content area is divided into several sections, each highlighted with a red box:

- TRIP SEARCH:** A section for booking flights, with fields for 'From' and 'To' and a 'Search' button.
- ALERTS:** A section displaying informational alerts, such as 'Trijpt creates a schedule with all your travel details in one place, accessible on Android or iPhone.'
- COMPANY NOTES:** A section displaying company notes, such as 'Fusion Demo 1 As of May 1, Welcome to Concur Welcome to Concur! Thank you for your participation.'
- MY TASKS:** A section displaying a list of tasks, including '99+ Required Approvals', '42 Available Expenses', and '31 Open Reports'.
- MY TRIPS (0):** A section displaying a list of upcoming trips, currently showing 'You currently have no upcoming trips.'
- FACTS & STATS:** A section displaying helpful travel tools, such as 'Did you know? Some countries won't let you enter if your passport expires within 6 months. Keep your passport updated.'

## Creating and Submitting a Request

1. Click the **Requests** tab at the top.
2. Click **New Request**.
3. Fill in all required fields in the **Request Header**.
4. Click the **Segments** tab.
  - This is where you will enter trip details and estimated amounts for each segment (air, car rental, and hotel) that you wish to book online through Travel Leaders, Inc.
5. Click the appropriate segment icon. Once you have completed appropriate fields (each segment detailed below), click **Save**.
  - a. Air – you will enter the type of trip (**Round Trip** or **One Way**), **Amount**, **From** and **To** Airports (or cities), the **Outbound** date and time, and the **Return** date and time.
  - b. Car Rental – you will enter the **Amount**, **Pick-Up City**, **Pick-Up Date**, **Drop-Off City**, and **Drop-Off Date**.
  - c. Hotel – you will enter the **Amount**, **Check-In City**, **Check-In Date**, and **Check-Out Date**.
6. When you have entered all desired segments, click **Submit Request**.
7. The Request will show in your Active Requests as **Submitted and Pending Approval**.

## Adding Expenses to a Request

1. Click the **Expenses** tab within the Request you are entering.
2. Select the appropriate **Expense Type**.
3. Complete the required fields marked with a red bar.
4. Click **Save**.
5. After you have added all of the expenses, click **Submit Request**.

## Requesting a Cash Advance

1. In the **Request Header** of the Request you are entering, enter the amount needed in the **Cash Advance Amount** field in the **Cash Advance** section at the bottom of the page.
2. Provide the business reason for the cash advance in the **Comment** field.
3. Click **Save**.
4. Add **Segments** and/or **Expenses**, and click **Submit Request**.

## Booking an Approved Request

### Option 1:

1. Click the **Requests** tab at the top.
2. Click the approved **Request Name** you want to open.
3. From the **Segments** tab, click **Book with Concur Travel**.

### Option 2:

1. Click the **Requests** tab at the top.
2. Look for the approved **Request Name** you wish to book.
3. Click the blue hyperlink **Book** to the far right.
4. Continue through the trip reservation and complete any required fields. If you wish to add any additional segments, a separate request for approval will have to be submitted before integrating to Travel booking.
5. Click **Proceed to Booking**.
6. Segment steps:
  - a. Air – Choose a flight time, and click **View Fares**.
  - b. Select the appropriate flight option.
  - c. Continue through the reservation process, and enter required information.
  - d. Click **Reserve Flight and Continue**.
  - e. Scroll down and click **Next**.
  - f. The **Trip Name** and **Trip Description** fields are pre-populated from the **Request Header** page.
  - g. Click **Next**.
  - h. The **Summary** shows the details of the trip. Scroll down.
  - i. Click **Confirm Booking**.