

## Quick Reference Card – User Profile Settings

### Getting Started

- Login to <https://ebs.msu.edu/>.
- Click the tile for Travel and Expense, SAP Concur.

### Review and Complete your Profile

- From the Concur homepage, click **Profile**, then **Profile Settings**.
- Complete the following Information.

### Your Information

#### Personal Information

##### Name - Required

- First and Last Name will be populated from your University HR record.
- Add Middle Name and, if applicable, Suffix to **match your government issued photo ID which you will present to airport security**.

NOTE: If Name information is incorrect, contact Human Resources.

##### Work Address – Required

##### Contact Information – Required

- Enter a work or home phone number.

##### Verify Your Email Address – Important!

NOTE: Your "@msu.edu" email address has already populated your profile. Verifying your email address allows you to:

- Email your receipts to [receipts@concur.com](mailto:receipts@concur.com).
- Forward travel plans to [plans@concur.com](mailto:plans@concur.com).

- Click the **"Verify"** link. A code is sent from Concur to your @msu.edu email address. Copy the code from the email message.
    - Return to your profile. Paste the code you received into the **Enter Code** box, then click **OK**.
    - You must also verify any departmental email you typically use. For example: if your department provides [xxxxxx@ctrl.msu.edu](mailto:xxxxxx@ctrl.msu.edu), this address must also be verified.
- Up to 2 additional email addresses can be added by using the "+ Add an email address". Concur will send verification codes to those email addresses.**

### Download Concur Mobile App – Highly Recommended

NOTE: Downloading the Concur Mobile App will allow you to conveniently manage and store trip information and receipts on your mobile device.

- Download the Concur mobile app.
- Sign up for mobile access in the Web version of Concur. Find the "Mobile Registration" section of your Profile Settings in Concur, locate your PIN, and enter it on the mobile app.
- Log in to the Concur mobile app using your Concur login and PIN.

### Emergency Contact – Required

- Enter the contact information for your emergency contact.
- If your emergency contact's address is different from your own, **uncheck** "Address same as employee" and add your emergency contact's information.

### Travel Preferences – optional, but recommended for frequent travelers

- Enter air, hotel, and car rental preferences.
- If you participate in Frequent Traveler Programs, click **Add a Program**.
- **Connect to [My Travel Network](#) here.**

### TSA Secure Flight

- Gender and Date of Birth are required.
- If you have a TSA Pre-check number, it can be entered.

### International Travel: Passports and Visas – Recommended for International Travelers

- Entering passport and visa information in Profile allows it to be available when booking travel.
- Enter passport/visa information and click **Save**.

## Quick Reference Card – User Profile Settings

### Request Settings

- Information, Delegates, Preferences, and Approvers are shared between **Request** and **Expense Settings**.
- Start with **Request Settings** and the information will carry through to **Expense Settings**. If changes are made to one section, the other section will automatically update.

### Request Delegates

**Note:** Expense delegates can prepare, but cannot submit expense reports on behalf of the traveler. It is the responsibility of the traveler to submit their own expense reports.

- Click **Add**, then begin typing the individual's name and select their record from the dropdown list.
- Check off the functions you would like your expense delegate to perform on your behalf (typically this includes prepare, book travel, submit requests, view receipts, receive emails).
- Click **Save**.

**Request Preferences** – no setup necessary

### Request Approver

- Your default approver will automatically display.

### Expense Settings

**Expense Delegates** – were set up with Request Delegates

**Expense Preferences** – no setup necessary

### Other Settings

#### E-Receipt Activation – **Highly Recommended**

Enables the auto collection of electronic receipts into the Concur application, from participating suppliers. Receiving e-receipts can save you time by pre-populating your expense report. To enable e-receipts with participating suppliers and to find out more, click [here](#).

- Click **E-Receipt Activation** link
- Accept E-Receipt Activation and Use Agreement.
- You will receive a confirmation that E-Receipts has been activated.

**System Settings** - Skip

### Connected Apps – **Highly Recommended**

**Note:** When using a connected app, such as Lyft or Uber, receipts are automatically sent to your receipt library.

#### Tripit Pro

- Locate **Tripit Pro** eligibility message on Concur home page (under Alerts) and click **Get It** link OR go to the App Center in Concur, select **Tripit**, and click **Connect**.
- Enter your @msu.edu email address, and a password, and click **sign up**.
- **Tripit** will send a verification email to your @msu.edu email address. Click the link in the email to verify the account.

#### Concur Mobile Registration

- Setup your mobile phone to capture receipts, submit expense reports, etc.
- Create a PIN, and click **Set PIN**.
- Download the Concur application to the traveler's phone, using the provided link, or by going to the App Store on the traveler's phone.
  - Login to Concur via the phone, using the traveler's @msu.edu email and PIN as the password.
  - Click **OK**, to allow Concur to send Notifications.

#### Expenselt

- Open Concur on the mobile device.
- Click the Menu icon (upper left corner).
- Click **Expenselt**. Click **Get**, then click **Install**.
- An icon will be added to the mobile device for **Expenselt**.

**Your Concur Profile Setup is Complete!**

### Questions

Contact the **Travel@State Project Team**:

- Phone – 517-355-5000
- Email – TravelAtStateProject@ctrl.msu.edu
- Web Inquiry – go.msu.edu/travel-changes