

## Getting Started

1. Log in to <https://ebs.msu.edu/>.
2. Click the link for **Travel and Expense – SAP Concur**.
3. You will be taken to the Concur home page.

## Create an Expense Report for Travel Booked in Concur

1. To start an Expense Report:
  - Click **Requests**, on the Quick Task Bar. Identify the applicable **Request**, and click **Expense** under the **Action** heading (far right side).
2. You will be taken directly to an Expense Report to add MSU card transactions or out-of-pocket expenses.
3. Click **Report Details** -> **Report Header** to verify information copied from the Request for accuracy and complete any additional required fields related to this trip.
4. Click **Save**.
5. Click on **Report Details** -> **Manage Travel Allowance**.
6. Click **Create New Itinerary** and put in your first and last stop then click **Save**.
7. Click **Expense and Adjustments** and note which meals were provided for each day.
8. Click **Create Expenses**.
9. Now you can add your MSU card transactions, out-of-pocket expenses, and cash advances.
10. Click **Add Expense**.
11. Click **Create New Expense** and enter expense information.
12. Click **Save Expenses**.
13. Travel Card and Agency charges (airfare and rail prepaid through MSU's Preferred Travel Agencies), will also display and must be added to the Expense Report.

## Travel Card and Agency Card Expenses

To add MSU Travel Card and Prepaid Travel Agency Card expenses to an open Expense Report, click **Add Expense**. Under **Available Expenses**, select the expenses to apply to the current Report, click **Add To Report**.

Travel & Agency Card transactions can also be added from the following screens. In each case, the Expense Report must be selected as well.

- Company Card Charges Page (Expense -> View Transactions)
- Available Expenses (Expense -> Manage Expenses)
- Quick Task Bar (Available Expenses)

## Entering Out-of-Pocket Expenses

1. In the open Report, click **Add Expense** -> **Create New Expense**.
2. Enter information in all required fields (indicated by a **red** asterisk).
3. Click **Attach Receipt** and select a receipt from your receipt store if they were loaded into Concur. Otherwise, browse your file directories to attach a copy of the receipt.
4. **Itemize** if necessary.

## Travel Allowances/Itinerary

If travel was booked outside of Concur or MSU Preferred Travel Agencies:

**Example: Traveling from Lansing to Seattle (round trip) for a conference. Booking not through University Travel Program.**

1. Create an Expense Report, go to **Report Details**, and click **Manage Your Allowance**.
2. Enter first Itinerary Stop (Lansing to Seattle), and click Save.
3. Or:
  - For non-direct flights (Lansing to Seattle with Detroit layover), it is not necessary to include layover destinations in the itinerary, just the final destination.
  - For trips that include stays at multiple destinations (e.g., Lansing to Chicago <with a stay>, Chicago to Seattle <with a stay>, Seattle to Lansing) there should be an itinerary for each stay and the return trip (in this case 3 itinerary stops).

4. Enter the **Next Itinerary Stop** (Seattle to Lansing), and click **Save**.
  - For non-direct flights (Seattle to Lansing with Detroit layover), it is not necessary to include layover destinations in the itinerary, just the final destination.
  - For trips that include stays at multiple destinations (e.g., Seattle to Chicago <with a stay>, Chicago to Lansing) there should be an itinerary for each stay and the return trip (in this case 2 itinerary stops).
5. Click **Expenses and Adjustments**.
6. For each day of travel, select checkboxes for meals provided.
  - These are meals for which the traveler does not need to be reimbursed (e.g., a lunch provided by a conference).
7. Concur will calculate the daily meal allowance, subtracting for meals that were not a part of travel, or were provided. The dates of travel are calculated at 75% of the per diem allowance for meals.
8. Click **Create Expenses**.

## Account Allocations

By default all expenses will be charged to the account entered in the Expense Report Header. To allocate to different accounts:

1. Check off the line item(s) you would like to allocate. Clicking in the checkbox to the left of **Receipt** selects all line items.
2. Click **Allocate, Add**.
3. Enter or select the appropriate accounting string values, click **Add to List**.
4. Allocate by percentage or dollar amount, add additional accounting strings as needed, click **Save** to return to your Report.
5. You can also allocate each individual expense when adding it by clicking **Allocate** on the **New Expense** screen.

## Attaching Receipts to an Expense Report

### Scanned Images:

1. Scan your receipts and save the file(s) to your computer.
2. Click on the line item that requires a receipt, click **Attach Receipt Image**.
3. Click **Upload Receipt Image** to locate the file, then **Attach** and **Close**.

**Email:** (your email address must be verified in your Concur profile)

1. Email your receipt images as attachments to [receipts@concur.com](mailto:receipts@concur.com). The receipts will be added to your Available Receipts.

## To Submit a Report

1. Click **Submit Report** button.

## Delegates cannot submit Reports.

1. As a Delegate, select **Notify Employee**. An email notification is sent to the employee indicating that the Report is ready for review.
2. The employee will find the Report on the Concur home page under **Open Reports**.
3. The employee can click the Expense Report name to open the Report, review the Report, and click **Submit Report**.

## To Recall a Report

1. Submitted Reports display on the **Expenses** home page, under **Active Reports**.
2. Click the Expense Report name to open the Report and click **Recall**.
3. Recalled Reports can be modified and resubmitted.

## Returned Report

Returned Reports display on the Expenses home page, under Active Reports. Employees receive an automatic email notification of status change for returned Reports. If the Report was entered by a Delegate, both the employee and Delegate receive the email and are able to act on the returned Report.

1. Click the Expense Report name to open the Report (returned Reports show with a **red** header).
2. Make the requested changes.
3. Click **Submit Report**.

## For Further Assistance

Contact the **MSU Travel & Accounting Offices:**

- Phone – 517-355-5000
- Email – [travel@ctlr.msu.edu](mailto:travel@ctlr.msu.edu)
- Web Inquiry – [go.msu.edu/travel-change](http://go.msu.edu/travel-change)