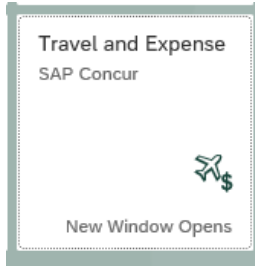
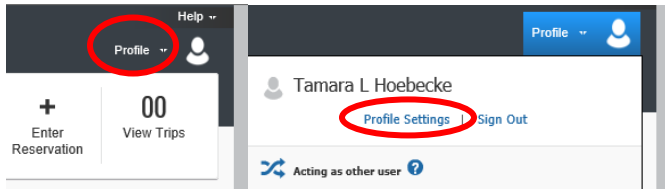


# Concur Travel System User Profile Instructions

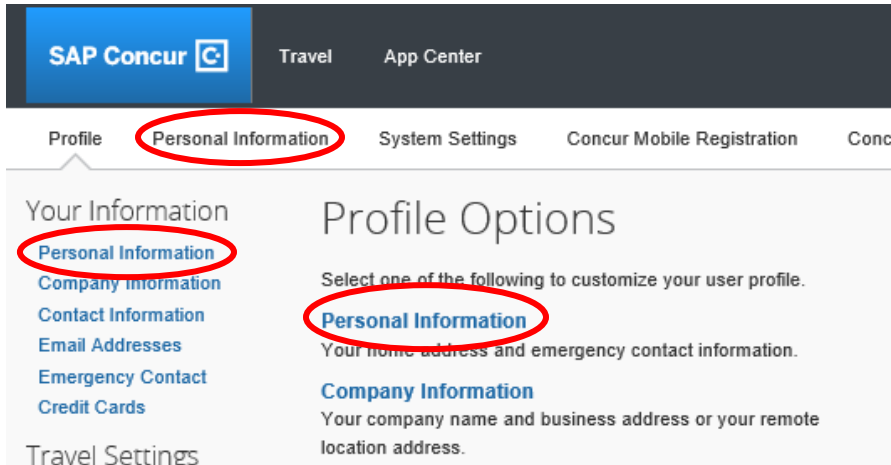
1. Login to EBS at [www.ebs.msu.edu](http://www.ebs.msu.edu), using your MSU NetID and password.



2. Click the tile for Travel and Expense, SAP Concur.
3. Click 'Profile' in the upper right corner then click on 'Profile Settings'



4. Click on 'Personal Information' using the menu on the left, across the top of the page, or in the center section.



- a. Add your Middle Name and, if applicable, Suffix to **match your government issued photo ID you will present to airport security**. If your ID does not show a middle name, click the 'No Middle Name' box under the Middle Name field. First and Last Name is populated from your MSU HR record. NOTE: All fields with [Required] or [Required\*\*] must be completed to save your profile. Also, there are 'Save' buttons throughout the profile. You do not need to save each section separately. All 'Save' buttons save the entire page, not just the section above it.

A screenshot of the 'My Profile - Personal Information' form. The form has a title 'My Profile - Personal Information' and a 'Jump To: Personal Information' dropdown menu. Below the title, there is a 'Choose' button and a note: 'Disabled fields (gray) cannot be changed. If there are errors in these fields, contact your company's travel administrator. Fields marked [Required] and [Required\*\*] (validated and required) must be completed to save your profile.' There is a 'Change Picture' button and a profile picture icon. Below this is an 'Important Note' box with a warning icon: 'Your Name and Airport Security: Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.' The form fields are: Title (Mrs), First Name (Tamara), Middle Name [Required] ( ), Nickname (Tammy), Last Name (Hoebecke), and Suffix ( ). The 'No Middle Name' checkbox is circled in red.

- b. Update your Work Address if necessary (Required).
- c. Update your Home Address if necessary (Required).
- d. Update your Contact Information if necessary (Required). You must include a home OR work phone number. It is a good idea to update your Primary Mobile Phone number by editing the device (if necessary) or Adding a New Device by clicking on the appropriate link.
- e. IMPORTANT – verify your Email Address, which has been populated with your “@msu.edu” email. This will allow you to email your receipts to [receipts@concur.com](mailto:receipts@concur.com) and to forward travel plans to [plans@concur.com](mailto:plans@concur.com). If the address is correct, click the ‘Verify’ hyperlink.

The screenshot shows the 'Email Addresses' section of a user profile. At the top, there are links for help: 'How do I add an email address?', 'Travel Arrangers / Delegates', 'Why should I verify my email address?', and 'How do I verify my email address?'. Below these is a table with the following columns: Email Address, Verification Status, Verify, Contact?, and Actions. One email address is listed: hoebecke@msu.edu, with a status of 'Not Verified' and a 'Verify' link circled in red. An 'Add an email address' button is circled in green. A large green arrow points from the 'Verify' link towards the right side of the page.

Once you have verified your email, a system-generated email will be sent to that email address. Copy the verification code from the email and paste it into the ‘Enter Code’ box that will appear on the screen below the ‘Verification Status’ section, then click the ‘OK’ button to the right. NOTE: Check your junk mail if you don’t receive the email in a minute or two. Also, up to two additional email addresses can be added by using the ‘+ Add an email address’ hyperlink. Concur will send verification codes to those email addresses as well.

- f. Update your emergency contact information (Required). If your emergency contact’s address is different than your own, uncheck the ‘Address same as employee’ box and add your emergency contact’s information.
- g. This is optional, but it is helpful if you update your air travel, hotel and car rental preferences, as well as your frequent traveler programs information. When your go-to person books your flights, she will know your seating preferences and can try to obtain a seat assignment accordingly. To add frequent traveler programs, click the ‘Add a Program’

The screenshot shows two sections: 'Car Rental Preferences' and 'Frequent-Traveler Programs'. The 'Car Rental Preferences' section has three dropdown menus: 'Car Type' (Intermediate Car), 'Smoking Preference' (Non-smoking), and 'Car Transmission' (Automatic). Below these is a text box for 'Message to Car Rental Vendor'. The 'Frequent-Traveler Programs' section shows 'Your Frequent Traveler, Driver, and Hotel Guest Programs' and a table with 'No programs defined'. An 'Add a Program' button is circled in red.

The next screen allows you to enter up to five programs. Begin by choosing the type (air/rail, car, or hotel), then select the company in the dropdown and enter your frequent traveler/membership number in the text field.

### Add Travel Programs

**i** Please enter programs EXACTLY as they appear on your card, excluding spaces and dashes. Do not add any additional characters. Do not include the carrier code. If you enter a program incorrectly, you will get a profile error from the reservation system. For example, if your card is printed "AA12345" or "John Doe/12345", your program number is "12345".

The page allows you to enter up to 5 travel programs at a time. First, select the type of program (carrier name, car rental, or hotel). Then, select the name of the company from the adjacent list. Finally, enter the program number (frequent traveler number, etc).

The screenshot shows a form with three sections for adding travel programs. Each section has a selection icon on the left, a dropdown menu for the company name, and a text field for the frequent traveler number. A checkbox for 'Make default for all SkyTeam bookings' is also present.

- 1** Air/Rail Carrier: Delta (dropdown), Frequent Traveler / Driver/ Guest Number (text field),  Search this vendor.
- 2** Car Rental Company: Enterprise (dropdown), Frequent Traveler / Driver/ Guest Number (text field),  Search this vendor.  Make default for all SkyTeam bookings.
- 3** Hotel: Hilton (All) (EH) (dropdown), Frequent Traveler / Driver/ Guest Number (text field),  Search this vendor.

- h. Please update the TSA Secure Flight section. Gender and Date of Birth are required. If you have a TSA Pre-check number, it can be entered in the field.

### TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No. TSA Pre Known Traveler Number

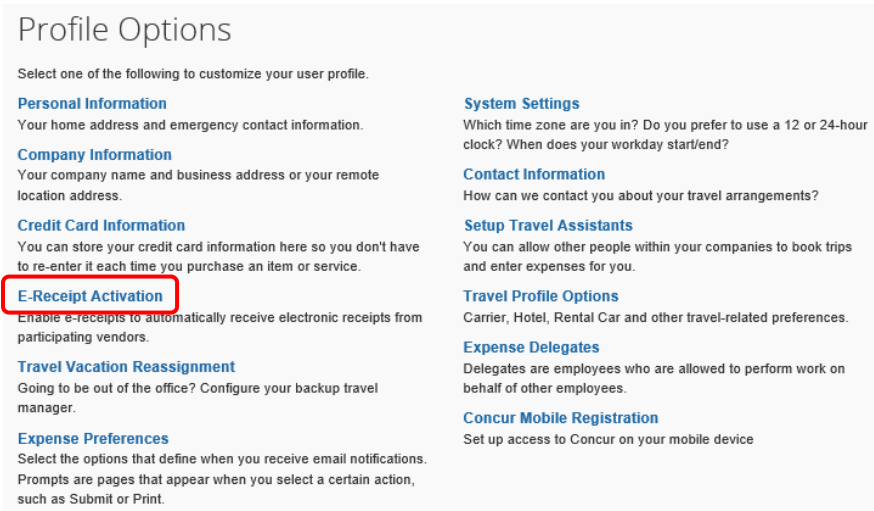
Male  Female

- i. Recommended for international travelers – please enter your passport and visa information so that the information is available when booking travel. Click on the ‘+ Add a Passport’ and/or ‘+ Add a Visa’ button.
  - i. When adding a passport you’ll need to choose the passport nationality from a dropdown, enter your passport number, date issued, expiration, place issued (city & state) and passport place issued (country). When finished, click on the ‘Save’ button.
  - ii. When adding a Visa, you’ll need to choose the Visa nationality and Visa types from dropdowns, then enter the Visa number and expiration. When finished, click on the ‘Save’ button.

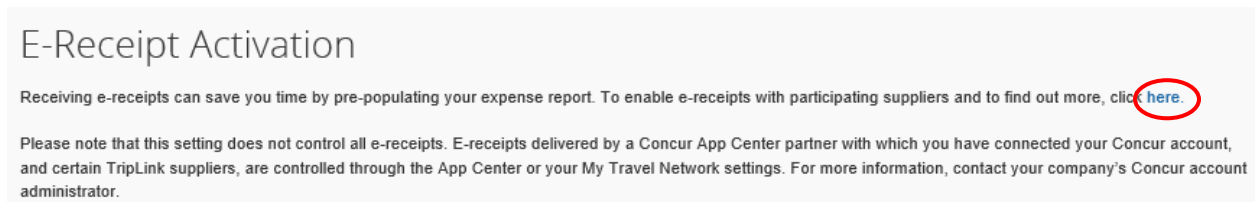
- j. Please use the ‘+ Add an Assistant’ button to add your go-to person to your profile. This will allow them to perform travel functions for you (book and prepare reimbursement for travel). After clicking the ‘+ Add an Assistant’ button, begin typing your go-to person’s last name in the field, then select them from the dropdown values. Please click both the ‘Can book travel for me’ and ‘Is my primary assistant for travel’ buttons, then click ‘Save’. (To provide coverage when your go-to person is out of the office, if your go-to person is Lupe Dominguez, please also add Janeen Hoover as an assistant, but do NOT click the “is my primary assistant for travel” box. If your go-to person is Janeen Hoover, please also add Lupe (Guadalupe Renee) Dominguez as an assistant, but do NOT click the “is my primary assistant for travel” box.)

Enter assistant’s last name here, then select them from the dropdown that appears

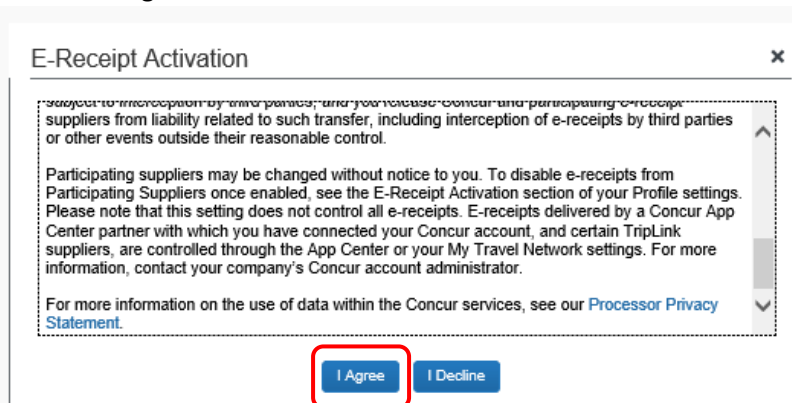
- k. Please add a personal credit card if you want your go-to person to make hotel reservations for you. Only the last 4 digits of our credit card number, expiration date and card type (AmEx, Visa, etc.) will appear.
  - l. Don't forget to click on one of the 'Save' buttons to save all of your updates!!
  - m. Click on 'Profile' in the upper left corner in the menu across the top of the page to return to the main menu.
5. Activate E-Receipts. This feature enables auto collection of electronic receipts into the Concur system, from participating suppliers. This saves you time by prepopulating your expense report!
- a. Click on E-Receipt Activation in the left column in the center of the page.



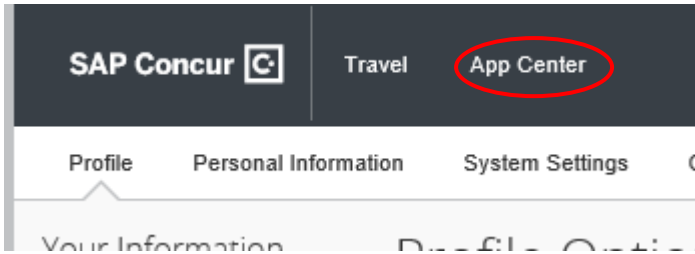
- b. Click the hyperlink to enable e-receipts.



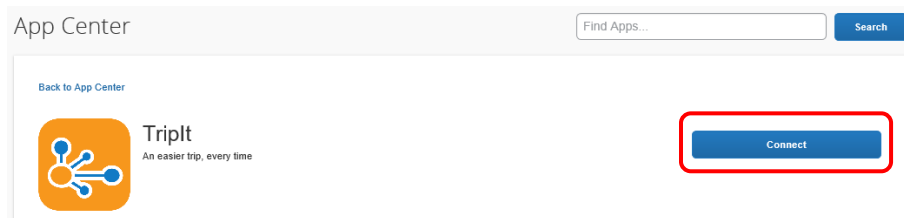
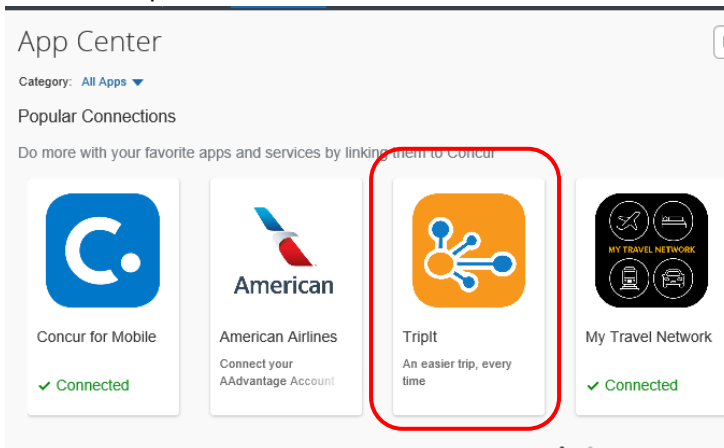
- c. Click the 'I Agree' button.



6. Click on Profile in the upper left corner to return to the Main Menu. Now click on App Center at the top of the page. When using a connected app, such as Lyft or Uber, receipts are automatically sent to your receipt library.

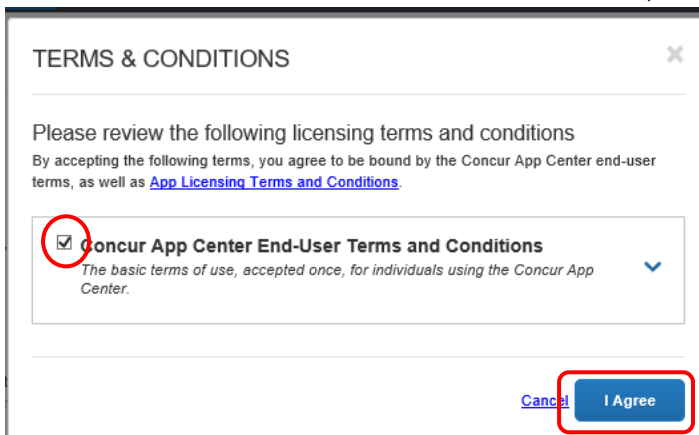


- a. Click on 'Triplt'.



- b. Click on 'Connect'.

- c. Click in the box next to end-user terms and conditions, then the 'I Agree' button.



Enter your @msu.edu email (if it isn't already populated), and a password, choose Country of Residence from the dropdown, click the box next to the User Agreement and Privacy Policy , then click on 'Create Triplt Account'.

## ACTIVATE YOUR TRIPIT PRO SUBSCRIPTION

All your travel plans, in one place



Get a master itinerary for every trip

Available on web, Android, and iPhone

Link your Concur and Triplt accounts and get:

- A free subscription to Triplt Pro from your company
- Real-time flight alerts
- Travel plans synced between Concur and Triplt

Create a Triplt account and connect to Concur

Email Address

hoebecke@msu.edu

Choose a New Password

\*\*\*\*\*

Must have at least 8 characters

Country of Residence

United States of America

accept the Triplt [User Agreement](#), have read the [Privacy Policy](#), and agree to link the Triplt account to Concur.

Create Triplt Account

I already have a Triplt account! [Sign in and link my accounts](#)

- d. To add ExpenseIt, open Concur on your mobile device, then click the Menu icon (upper left corner). Click ExpenseIT, then 'Get', then 'Install'. An icon will be added to your mobile device.

Further instructions will be provided that will allow you to establish delegates that can prepare requests, book travel, view receipts, receive emails and prepare expenses for you. If you have any questions or need assistance, please see your go-to person, or contact Andrea Worful at 517-355-1811 or at worful@msu.edu.