



# Frequently Asked Questions

**Q: What is the difference between a travel arranger and a delegate?**

**A:** A travel arranger is a user who can book travel on the behalf of the traveler. A travel arranger can also see the travel itinerary. A delegate is someone who can prepare and submit requests and/or expense reports on the behalf of the traveler. A delegate can also view requests and expense reports.

If you have questions on how to add a delegate or travel assistant/arranger, please refer to videos on our website called, "Setting Up a Delegate," and "Setting Up a Travel Arranger."

**Q: I have a student wanting to travel, but he/she does not have access to Concur. What do we need to do?**

**A:** As of right now, only graduate students and student workers who are tied to a payroll org can use Concur. If the student is not tied to a payroll org, please use the paper process. If you are unsure whether an individual is in Concur or not, please email [concurhelp@travel.msstate.edu](mailto:concurhelp@travel.msstate.edu) with the individual's name and 9-digit ID.

**Q: What is the difference between the Concur Help email and Concur User Support?**

**A:** The Concur Help email is an email that is associated with Mississippi State University. The emails for Concur Help come directly to Travel Services. Concur User Support is a support service through Concur that provides user support to all travelers/employees for Mississippi State University. If there are any navigation and error messages in Concur, mobile app issues (other than setting up the app), and Trip IT account issues, please contact Concur User Support at 1-866-793-4040.

**Q: I am creating a request, but what is the correct booking option for "How will you book your trip?"**

**A:** The **Self-Booked in Concur** option should be chosen if the employee or travel arranger will be booking segments (air, hotel, car) in the Concur Travel Module. **Note that booking through Concur is booking through Travel Leaders.** The **Non-Agency Booked** option should be chosen if the employee will not be using the Travel Module (Travel Leaders) to book segments (air, hotel, car). Examples of Non-Agency booked trips are conference hotels, host paying for airfare, routine travel, etc. The **Agency-Booked** option should be chosen if the employee will be contacting Travel Leaders by phone or email. Examples of agency-booked travel are complicated travel arrangements, group travel, etc.



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**Q: When I enter the fund, org, and program codes, they are disappearing. Why?**

**A:** When entering the funding information into the header, make sure to select Either in the filter box. Once Either has been selected, enter the funding information slowly to give Concur time to react. Once the correct information has appeared in the drop-down box, click on correct funding. You must click on the funding from the drop-down in order for the funding to not disappear.

**Q: How do I obtain an EBTA number now that our department is using Concur?**

**A:** When using the “Self-Book in Concur” method, you will choose to charge the EBTA ghost card under “Method of Payment”. There are no more EBTA numbers. If you are using the “Agency-Booked” method, you will call/email and agent directly, and provide them with the PDF version of your approved request. You can print/email the approved request by opening the request and clicking the Print/Share button at the top right.

**Q: Why haven’t I received my cash advance if my request has been approved?**

**A:** The method that was selected in the request for “How will you book your trip?” controls when the cash advance is forwarded to Travel Services. If the “Self-Book in Concur” method is chosen, the traveler or travel assistant/arranger must book the trip in Concur before the cash advance is forwarded to Travel Services. If the “Non-Agency Booked” or “Agency Booked” method is chosen, the cash advance will be forwarded to Travel Services after the approver approves the request.

If you have questions on how to request a cash advance, please refer to the PDF on our website called, “Requesting a Cash Advance”.

**Q: How do I know whose queue my travel request and/or expense report is in?**

**A:** To view whose queue a request is in, go to the Request tab and locate the request you need the status of. Underneath the “Status” column, it will give you the status of the request, along with whose queue it is in. You can also view the Audit Trail. Within the request, go to Request Details > Audit Trail to view the history of the request. Within an expense report, the Audit Trail can be found by opening the report, clicking on Report Details and Audit Trail.

**Q: If the traveler is not asking for reimbursement, what is the procedure for getting pre-approval for the trip in Concur?**

**A:** Concur is programmed to reimburse travelers. To get pre-approval for a trip in Concur, you will have to trick the request into thinking that the traveler will be reimbursed upon return (note: no expense report will be submitted so the traveler will not actually be reimbursed). We recommend adding a \$1.00 estimated expense into the request, which will allow Concur to follow the appropriate steps to get the pre-approval for the trip. Since the traveler will not be reimbursed, after the approver has approved the trip and the traveler has returned from the trip, go into the request and click More Actions > Close Request.



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**Q: Why did I receive an email from Concur saying that the trip I booked has been cancelled?**

**A:** When booking the trip through the homepage of Concur, Concur puts a timestamp on the reservation and the request. If the request has not been approved before the timestamp expires, the reservation will be cancelled. **Note: this is the incorrect way to book travel!** The correct way to book travel in Concur is to create a “Self-Book in Concur” request, get the request approved, and book the travel through the request using the “Book” link.

**Q: If the request has been approved, but the price of the airfare goes up, does the request need a second approval?**

**A:** Yes, even after approval, if the amount of the airfare increases before the traveler or travel assistant decides to book the segment, the request will have to get a second approval. Please reach out to [concurhelp@travel.msstate.edu](mailto:concurhelp@travel.msstate.edu) for guidance on correcting your specific situation.

**Q: If I am self-booking my trip in Concur and combining personal and business, what is the appropriate method of payment?**

**A:** When self-booking travel in Concur for personal and business travel, the appropriate and correct method of payment is to use your personal card. **Do not choose the EBTA method of payment when mixing both personal and business.** Remember to change the option to the correct option under “Method of Payment”.

**Q: When adding daily meals, why am I getting a red flag that says, “this entry cannot be submitted until a Travel Allowance itinerary is created”?**

**A:** In order to claim meals, Concur must first know the itinerary of the trip to determine the daily meal allowance. To create an itinerary for the report, go into the report header (Report Details > Report Header), scroll down the bottom, and select Yes to the question “Will this report have any travel allowance meals?”.

**Q: I owe part of the advance back to Travel Services, what are the proper steps on how to reimburse the funds?**

**A:** To clear an outstanding cash advance, there is a user guide on our website ([travel.msstate.edu](http://travel.msstate.edu)) that takes you step by step through the steps of clearing the cash advance. Please refer to the document under the Concur tab titled, “Steps to Clear Outstand Cash Advance Balance”.

**Q: My department head wishes to add me as an approver to preview/approver reports for him, what is the procedure on adding additional approvers in Concur? What access should my department head grant me when he adds me as an approver delegate?**

**A:** Approvers cannot be added to an org within a Concur profile, but approver delegates can be. If the department head wishes to add delegate approvals or set someone up to preview requests/reports on his behalf, the department head can do this within his/her profile under



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Request Delegates or Expense Delegates (there is a video on our website titled “Setting up a Delegate”). The only stipulation is that the person the department head is delegating to must have approval status in Concur. If there is someone in the department who currently does not have approval status, but the department head would like for him/her to approve requests/reports or preview for them, an email will need to be sent to [concurhelp@travel.msstate.edu](mailto:concurhelp@travel.msstate.edu) stating that they would like to grant access approval access to that person. Once the person has been granted the appropriate access, the department head can add him/her in his/her profile as an approver delegate.

When the department head is adding someone as an approver delegate, he/she has two options to grant the delegate. The department head can choose between two options: “Can Preview for Approver” or “Can Approve Temporary”. **Note: the department head cannot choose both options.** If the department head just wants the delegate approver to preview documents and review all information before the report is sent to him/her for approval, then the department head will need to check the box called “Can Preview For”. If the department head trusts the delegate approver and wants the delegate approver to approve for the department head, then the department head must check the box titled “Can Approve Temporary”. **Note: that when choosing this option, the department head can put the date far out in the future or if the department head wishes to only let the delegate approver while he/she is out of the office he/she can do that too.**

**Q: I am a delegate approver, but where do I go to view requests/reports than need to be approved?**

**A:** The delegate approver will have to “Act As” the department head to view the approvals that are in his/her queue. To do this from the homepage in Concur, click on profile > acting as other user > enter the name of the department head within the search box to choose the user, click switch.

**Q: How do I reconcile my books against Concur expense reports?**

**A:** ITS created a form in Banner to help reconcile Concur expense reports against the monthly/yearly ledgers. For out-of-pocket expenses, the form name in Banner is **FWRCONR**. For EBTA expenses, the form name in Banner is **FWRTRTA**. For Travel Card expenses, the form name is **FWRTRTC**. There is a guide on our website ([travel.msstate.edu](http://travel.msstate.edu)) that takes you step by step through Concur-Banner Reconciliation. Please refer to the document under the Concur tab titled, “Concur-Banner Reconciliation”.

