

Concur Travel Instructions

Below is a Step by Step guide to using the My ASU TRIP/Concur system. All travel completed for ASU business must be submitted through the travel system, even if it is a zero-dollar travel. Concur acts like a financial story of your trip. The Trip Request is what you expect to spend on the trip. The Expense Report is what you actually spent on the trip. If you have questions or encounter problems, please email SSFD.Travel@asu.edu. Please see the links to policy, guidelines, and other resources below:

- [My ASU TRIP Access](#)
- [Student My ASU TRIP Profile Request](#)
- [My ASU TRIP System Manual](#)
- [**COVID-19 Travel Guidance](#)
- [Travel Card Request Form](#)
- [Traveler Resources](#)

Please note:

Student Travel: If you are a student and this is your first time using the My ASU TRIP, you must **create a Travel Profile at least 5 Weeks Before You Travel**. Use the [My ASU Trip New/Updated Profile Request Form](#) to request a travel profile. It usually takes 3-5 business days for your profile to be created. You will not receive notification that your profile is completed. You will need to login to see if your profile has been created.

COVID-19 Restrictions: Refer to ASU's [travel guidance page](#) for the latest COVID-19 travel guidelines and restrictions.

International Travel:

- Faculty and Staff wanting to travel internationally must obtain approval via email from Dean or VP stating the nature and necessity of the trip and the safety precautions you will take.
- All students traveling internationally (and any Faculty and Staff accompanying the students) must register the travel [here](#).

Creating a Trip Request in Concur (Before You Leave)

- 1) In preparation for completing your My ASU TRIP request please prepare all back-up material. This should include the total cost estimates for your upcoming travel event, the conference itinerary or other written back-up documentation of where, when, and why this event is occurring, and have a business purpose justifying the travel on behalf of ASU. **Please make sure to add these to the attachments prior to submitting to the Cost Center Manager.**
- 2) After receiving your Travel Profile, login to the [My ASU TRIP webpage](#), which will bring you to the My ASU TRIP landing page where all policies and manuals are available.
- 3) Click on the My ASU TRIP access on the right side to go into the Concur system.
- 4) To start a request, click on the "New" button near the top. A drop down will appear, and select new request. For additional assistance, please click [here](#) to open the travel guide; pages 33-46 are most relevant.
- 5) The information you enter in the Request, Segments, Expenses and Approval tabs is your anticipated costs based upon information you have searched for your trip.

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- 6) On the **Request page**, you should see 4 tabs. Complete the Request Header, Expenses and Approval tabs in order, so you do not risk losing information. Do not enter information on the Audit Trail tab. All items that have a red line on the left side require an answer.
- 7) The **Request Header**
 - a. You will enter basic trip information; destination, dates, purpose etc.
 - i. In the box marked "Project/Gift/Grant Program": Enter cost center as CC0638 unless provided an alternate cost the RA or Business Ops Team
 - ii. Enter the program, gift, or grant number
 - iii. **You will be able to amend the exact accounts to which various expenses are charged at the time you submit your expense report.**
 - b. In the "Public Purpose/Benefit to ASU" box give a simple & brief answer such as "Attend/present at XYZ planning conference."
 - c. In the "Comment" box
 - i. Elaborate on the reason for the trip, including how this trip will benefit ASU and SSFD. "Sharing research/advancing my education/networking with other professionals in the field. This will help me support ASU/SSFD's educational and research missions." If the travel is being charged to a grant account then clearly specify how the travel relates to and benefits the sponsored project. If you run out of room in the comment box, type "see additional comments" where you have plenty of room. The more detailed you are the least likely the request will be sent back to you for changes.
 - ii. If you expect to use multiple funding sources at expense report time, please give a brief breakdown in this comment box (ex. GR12345 \$500; GR99999 \$500; PG01234 \$400)
 - d. Include the following language **"I acknowledge that all expenses incurred on this trip that exceed funding awards documented at the time of expense report submission will be paid out of personal funds."**
 - e. In addition, this is where you enter the dates, destination and total estimated amounts anticipated for the trip for hotel and airfare.
 - f. **If you are adding any personal time to the trip, please attach price quotes for two fares – one for your actual dates of travel and one as if you travelled only to attend the conference. You may only claim the lower of the two quotes. Please keep this comparison quote to attach to expense report along with the airfare receipt. If you added personal travel days to your trip, please email SSFD.Travel@asu.edu for assistance.**
 - g. ASU requires that for trips with Car Rental reimbursements the driver/renter of the car *must* complete the [ASU Defensive Driving Course](#). **It can take several weeks to get driving approval due to DMV delays, so apply early**
 - h. Be sure to click the **"SAVE"** button in the upper right corner, when you have entered all information.
- 8) The **Expenses tab** is for additional items for the trip such as meals, conference registration and any other item not listed on the Segments tab. **Please include any possible expense at request time, because if your eventual expense report exceeds the approved request amount then we must secure Dean's office approval for the reimbursement.**
- 9) Prior to submitting your travel, please review the Request to ensure you have completed all sections and have included all pertinent backup such as the conference itinerary and other related items.

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- 10) The [Approval Flow tab](#) is where you enter the travel administrator's name that has been assisting you as the Cost Center Approver. If you have questions on your travel administrator, please contact SSFD.Travel@asu.edu.
- 11) Once you have entered all of these items and there are no error messages, hit the red "Submit Request" button in the upper right corner.

You will receive email notifications with status updates and approval or denial of your requests.

Once you receive notice that your trip is approved: Through Concur, book your airfare, hotel, transportation. Pages 55-69 of the [travel guide](#) can assist you with booking. You will need digital (PDF) copies of everything you purchase. They must clearly show the amount that was paid, date of purchase, dates of travel. ASU will not reimburse for airplane seat upgrades (business, first-class or early bird check-in) or personal travel time (days added to a trip that are not directly connected to the reason for travel). Please email Travel.SSFD@asu.edu if you are including personal travel time, for further instructions.

Remember not to exceed your approved travel budget while on your trip. Per Diem (daily food allowance) is an option if you have funds in your budget.

Expense Report (When you return)

When you return from your trip you must complete an Expense Report in the My ASU TRIP system **within 14 days of returning or you may lose funding. This is especially important for Grad College & GPSA travel awards.** If you added personal travel days to your trip, please email SSFD.Travel@asu.edu, prior to completing the expense report to make sure you enter the approved travel information correctly.

- 1) Login in to the My ASU TRIP System.
- 2) Select "Expense" at the top of the page. You should see your trip entered in on the page, select the box next your trip name, to begin completing your Expense report. See pages 71-100 of the [travel guide](#) for additional help on completing and submitting your expense report. On each of the tabs everything in **red** must be completed. Most fields should be filled-in from the approved request. Please review each area including:
 - a. Your Public Purpose/Benefit to ASU. If it is longer than allowed by the box, enter "See Comment Box" and type your trip justification in the Comment Box.
 - b. For assistance with the Project/Gift/Grant/Program and Cost Center information please contact SSFD.Travel@asu.edu
 - c. Next, enter the details of your trip including [travel dates and travel information for your trip](#).
 - i In the tabs on the Itinerary page is where you enter all food Per Diem. Checking the box means to exclude that meal from your trip.
 - d. Once you have completed the Itinerary page, you must enter your expenses.
- 3) Below are a few tips to help with entering each expense type:
 - a. Lodging: Airbnb is listed under "Other Accommodations/Airbnb"
 - b. Other Transportation: Shuttles are listed in Charter Bus. Uber/Lyft is listed under Taxi. Subway is listed under Public Transportation.
 - c. Meals: Non-Standard Meal Allowance is a good way to get the full amount of money if you received additional funds from GPSA or Grad College. **DO NOT** use Business Meals or Meals on Travel Card.
 - d. Misc Travel Expense: Be sure to upload your Conference Brochure. **DO NOT claim Internet Fees.**

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- e. Misc Travel Expense: Upload award letters from GPSA, Grad College or other non-SGSUP funds in Other Supporting Documentation.
 - f. Office & General Expense: You can ask to be reimbursed for posters printed, photocopies. If you used Fedex to ship items, enter this under Postage.
- 4) Do not forget to upload your receipts on each page using the "Attach Receipt" button located in the lower right corner. You do not need receipts for Per Diem (daily food spending).
 - 5) If you have any **Exclamation Points** in the Exceptions area, you cannot submit your Expense Report. Please email, ssfd.travel@asu.edu for assistance.
 - 6) Once you have entered all information, uploaded receipts make sure the Total Amount is within your funding limit budget. Requests submitted above the approved budget **will be declined and sent back.**
 - 7) Once submitted you will receive email notifications about the status and approval or denial of your Expense Report.