My ASU TRIP manual

ASU Travel Service Center

Call 480-965-3111

Mon. through Fri., 8 a.m. to 5 p.m., Arizona time

Email: MyASUTrip@asu.edu
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Profile

Update profile information

1. From the My ASU TRIP homepage, click profile.
2. Then, click profile settings.

3. Click personal information.

4. Verify that the first, middle and last name fields match the official identification documents. If any of the fields do not match your ID, changes can be made as shown below:

<table>
<thead>
<tr>
<th>Title</th>
<th>Optional.</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>To change, contact the Travel Service Center.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>If your travel documents do not display a middle name, use the checkbox below the field. If the middle name needs to be changed, contact the Travel Service Center.</td>
</tr>
<tr>
<td>Nickname</td>
<td>Optional</td>
</tr>
<tr>
<td>Last Name</td>
<td>To change, contact the Travel Service Center.</td>
</tr>
<tr>
<td>Suffix</td>
<td>Optional</td>
</tr>
</tbody>
</table>

Changes made by the Travel Service Center are not permanent. Changes can be overridden by PeopleSoft if your department, position or salary changes. The Travel Center recommends you...
Profile

make the change permanent by completing the Name Change/Change of Address form in person at the Office of Human Resources. You must provide your Social Security card so HR can verify your identity when you do so.

5. **Company information** is auto-populated from PeopleSoft.
6. Complete the optional **work address** field.
7. Enter your home address in the **home address** section.
8. Enter **contact information**. A work phone or home phone is required.

Note: **Required** does not disappear after field completion.
Profile

Activate E-receipts

Follow these steps to active e-receipts.

1. Click **profile**.
2. Click **profile settings**.
3. Click **e-receipt activation**.
4. Click **I accept**.
E-Receipt Activation and Use Agreement

Please read the following E-Receipt Activation and Use Agreement. To view the rest of the agreement, please scroll down.

We are pleased to offer you participation in our e-receipt program (our "e-receipt program"), which enables our automatic collection of the electronic receipts and folio data generated by your transactions with suppliers that participate in our e-receipt program (collectively, "e-receipts") for use in connection with Concur services. In consideration for providing you with access and use of our e-receipt program in connection with Concur services, you hereby understand and agree to the following:

1. You hereby grant Concur Technologies, Inc., your company, and each of their respective affiliates, agents, suppliers, successors, and assigns (collectively, the "data processors") the irrevocable, perpetual, worldwide, royalty-free right and license to send and receive e-receipts generated by your transactions with participating suppliers, including without limitation air, rail, hotel, car rental, and other ground transportation suppliers, and to use such e-receipts provided

You must ACCEPT all of the terms of the E-Receipt and Use Agreement in order to proceed with use of our e-receipt program by pushing the I ACCEPT button below. If you do not wish to proceed with such use of our e-receipt program, then please press the I DECLINE button below and you will not participate in our e-receipt program.

I Accept  I Decline
Profile

Add a delegate

A delegate can create a trip request or expense report on your behalf and book travel, but cannot submit an expense report for you.

1. Click **Profile** at the top of the My ASU TRIP home page. Then, click **Profile Settings**.

2. Click **Expense Delegates**.

3. Add delegate by clicking **Add**. You can search by employee name, email address, employee ID or logon ID. Select your delegate and **Add**.
4. Check boxes that apply. You have not assigned a delegate until these boxes are checked.
   - **Can Prepare**: Delegate can prepare requests and expense reports on your behalf.
   - **Can Book Travel**: Delegate can book travel within My ASU Trip for you.
   - **Can Submit Requests**: Delegate can submit a completed request on your behalf; they will not be able to submit an Expense Report for you.
   - **Can View Receipts**: This allows them to view receipts and is necessary for them to be able to complete requests and expense reports.
   - **Receives Emails**: The delegate receives an email when requests or expense reports have been approved or sent back for revision.

5. Click **Save**.
Apply for an ASU Travel Card

1. Sign into the travel card application page with your ASURITE ID and click submit new form.
2. Enter the applicant’s ASURITE ID. If applicable, include the ASURITE ID of the department contact.

3. Click continue.

The submit new form page appears with the user's employee information and an approving cost center or grant field, which requires completion. The system uses the approving cost center of grant field to route the card application for approval. The cost center or grant entered does not affect where the card charges are expensed.

4. Click the ASU Travel Card Standards of Use and ASU Commitment to Ethics links and read both documents.
5. Complete the phone number field. This information is provided to U.S. Bank, who will contact you at this number if necessary.
6. Scroll down to complete the card use section.
   o If this is your initial application, click a radio button under amount select one to request a monthly limit or enter an alternate amount in the text field labeled other. Request the greatest amount of travel expenses you expect per month.
   o If you currently have a card and are requesting a card limit increase or decrease, check the increasing limit or decreasing limit box and enter the requested new limit in the text field labeled other.
   o If you are changing departments check cardholder transferred departments.

7. Review and select each checkbox in the acceptance of terms section.
8. Click **continue**.
9. Select an option in the Travel Approver and Dean/VP Approval sections and click **continue**.

ASU Travel Card Application

Submit New Form

**Approval Information**

**Travel Approval – select ONE**

- 
- 
- 
- 

**Dean/VP Approval – select ONE**

- 
- 
- 

**Cancel**  **Continue**

10. A confirmation window appears to explain your application has been received and is awaiting approval.

Click **forms in process** to check on the application status.
Request an approver role

1. Click service in My ASU.
2. Click **access requests** under IT Services.
3. In the drop-down menu, click **PeopleSoft access request**.
4. Enter your ASURITE and click **continue**.
5. Explain in the **purpose for access request** field the reason for the requested role.
6. Enter your supervisor’s ASURITE and click **continue**.

If you are applying for an ATO role, ensure the name is a dean or vice president.

7. Click **add role**.
   - If applying for the **My ASU TRIP approver** role, you must be a Cost Center Manager or Grant Manager in Workday.
8. Select the necessary rule under **human capital management – financial services travel**.

9. Click **save and return**.
10. Click **save and submit** to forward your request for approval.
Approver

Approve a trip request

1. From the My ASU TRIP homepage, Click Approvals at the top of the page > Requests > and the name of the Trip.

2. The Request Header opens. Review the details. Any field not grayed out can be modified as necessary. Hover over for additional information about a field.

3. Yellow exceptions are informational. These should be reviewed, but do not prevent approval.

4. Open Segments to review airfare, hotel, car rental, and train details. Modify allows you to add a comment. On the hotel, the Lookup Per Diem Lodging Rates show the state allowed lodging limits for the destination.
5. Open the **Expense Summary** to view individual expenses. Expenses with an **Approved Amount** field can be reduced by the approver; calculated fields are unable to be reduced (mileage and daily allowances). For a change to the calculated fields, the request will need to be returned to the traveler. Add comments as necessary.

6. Review Allocations, modify if necessary. These determine how a request will be pre-encumbered. Optional worktags (department reporting roll, department reporting, ASU audit reporting and academic employee) can be modified or added.
7. Click **Attachments, View Documents in a new window** to review any attached documents, **Attach Documents** to add anything additional. Be sure your pop-up blocker is not enabled.

8. Open the **Approval Flow** and select the next approver. Select the next approver by typing in the first letter of the last name and selecting the appropriate individual.
9. The Audit Trail shows all submission and approval statuses for the history of the request.
10. The Travel Advisory is an assessment of the risk associated with destinations in the request.

11. Send Back Request or Approve. Add a comment if you want to send back the request. The traveler will receive an email with the comments included. They should make the appropriate adjustments and resubmit. Approve will send the request to the next approver you have specified.
Approvers

Approve an expense report

1. Click the name of an expense report. The expense summary tab opens.

![Expense Summary](image-url)
2. Click **View**, then expense type to view sorted expenses.

3. Review each trip expense, payment type, assigned expense type, reasonableness of charge, and compliance with ASU and funding source policy. Add clarifying comments as needed.
4. View receipts by hovering over the blue receipt icon. Hover over the green travel card icon for additional transaction information.

Icon Key

<table>
<thead>
<tr>
<th>Transaction paid with ASU Travel Card</th>
<th>🔒</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-receipt attached</td>
<td>📈</td>
</tr>
<tr>
<td>Receipt image attached added via mobile device</td>
<td>📱</td>
</tr>
<tr>
<td>Receipt attached</td>
<td>✔</td>
</tr>
<tr>
<td>Expense has an allocation or optional worktags</td>
<td>📝</td>
</tr>
<tr>
<td>Expense marked as personal</td>
<td>🌟</td>
</tr>
<tr>
<td>Comment added</td>
<td>📝</td>
</tr>
<tr>
<td>Flight itinerary</td>
<td>✈</td>
</tr>
<tr>
<td>Hotel reservation</td>
<td>🏨</td>
</tr>
<tr>
<td>Car rental reservation</td>
<td>🚗</td>
</tr>
<tr>
<td>Taxi reservation</td>
<td>🚖</td>
</tr>
<tr>
<td>Denotes exceptions associated with the trip</td>
<td>⚠</td>
</tr>
</tbody>
</table>

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5. View allocations and/or optional worktags by hovering over the allocation icon. Click **allocate** to modify.

6. Click **details** to access menu for expense report details.

7. Click **receipts** to view all receipt details.
8. Ensure required receipts and brochures are attached. Attach a receipt or additional documentation by clicking **attach receipt** on the appropriate expense.

9. Review exceptions, which populate as red or yellow warning icons, and add comments to clarify any unresolved issues.

10. If necessary, reduce the amount for any expenses, except for the calculated fields mileage and daily allowances. Explain why you made the change in the expense’s **comment** field. The **comment** field is not available for the **business meal** expense type. Comments can be made in the **business meal purpose** field or in the report header by clicking **details**, then **report header**.

11. Review **summary**. Amount due company is owed to ASU and will be payroll deducted. Amount due employee will be reimbursed to the traveler.
12. Approvers have three options:

- Option one – Click **send back to user** to return the request to the sender for corrections or additional documentation. The traveler receives an email the report has been returned to them. Any comments added in the comment field provided when you **send back to user** are included in the email and recorded in the audit trail.

- Option two – Click **approve** to approve the expense report. A pop-up window appears. **Accept** the final confirmation. If other approvals are required by the designed approval workflow, you must insert the name of the next approver. To enter the next approver, enter an asterisk or begin typing the last name. Select the appropriate approver and **approve**. An additional pop-up window will appear confirming your approval. The next approver in the **Approval Flow** will be notified of the pending request. You will be directed back to Reports Pending your Approval.

- Option three – Click **approve and forward** to send to an approver who is in addition to the designed approval flow. To enter the next approver, enter an asterisk or begin typing the last name, select the appropriate approver and **approve and forward**. A pop-up window appears. **Accept** the final confirmation. An additional pop-up window appears to confirm your approval. The next approver is notified of the pending request. You will be directed back to reports pending your approval.
Approvers

Designate an approval delegate

If you are an approver, you can designate a delegate to:

- approve in your absence or
- preview requests and expense reports in your approval queue and notify you when they are ready for your approval.

To approve on your behalf, assign an individual with an equivalent approver role in My ASU TRIP.

To preview for you, the individual does not need to be an approver.

1. Click profile at the top of the My ASU TRIP home page.
2. Click profile settings.

3. Click expense delegates.
4. Click **add**. You can search by employee name, email address, affiliate ID or ASURITE and then select the appropriate individual.

5. If you want them to approve on your behalf: Check **can approve**. If you want them to **receive approval emails**, that checkbox should also be checked. Many approvers will check that box only during the time they would like the delegate approver to approve on their behalf. As long as the box is checked, the delegate approver receives an email every time you have something to approve.

6. If you want them to preview for you. Check **can preview for approver**.

7. Click **save**.
Find requests and expense reports you have approved

All requests and expense reports you have approved remain in your history.

Click approvals > requests > view for a drop-down menu. Select the time frame of approved requests.

Click approvals > reports > view for a drop-down menu. Select the time frame of approved expense reports.
Approvers

Use the search bar to search for a specific request or expense report.

Click the blue column headings to sort.
Delegates

Act as a delegate

1. Click **profile** at the top of the home page.
   - If you have been designated a delegate, the **acting as other user** field appears below the profile settings link.
2. Click in the field
   - A list of employees for whom you can act on behalf of appears or you can begin typing a name to search.
3. Select the appropriate name.
4. Click **start session**.
5. The My ASU TRIP home page automatically updates and shows you are now administering for another user.

To stop delegating, click **done acting for others**. Your home page then returns to normal.
Delegates

Remove yourself as a delegate

1. Click **profile** at the top of the My ASU TRIP home page.
2. Click **profile settings**.
3. Click **expense delegates**.
4. Select **delegate for**.
5. Check the box next to the name you would like to delete.
6. Click **delete**.
7. Click **ok**.
8. Click **I’m Assisting**… to remove a traveler you are able to book travel for.
Delegates

<table>
<thead>
<tr>
<th>Username</th>
<th>Can Book Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acosta, Andrea M.</td>
<td>Yes</td>
</tr>
<tr>
<td>Cabrera, Margot H.</td>
<td>Yes</td>
</tr>
<tr>
<td>Sanchez, Maria E.</td>
<td>Yes</td>
</tr>
<tr>
<td>張, Ming</td>
<td>Yes</td>
</tr>
<tr>
<td>Song, Young</td>
<td>Yes</td>
</tr>
</tbody>
</table>

You are currently assigned as an assistant for the following people:
Create a trip request header

1. The request header tab displays a list of fields. Text fields with a red bar indicate a system requirement.

<table>
<thead>
<tr>
<th>Field</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip name</td>
<td>Create a unique, easy-to-remember name for your trip.</td>
</tr>
<tr>
<td>Trip type</td>
<td>Select the appropriate option from the drop-down menu.</td>
</tr>
<tr>
<td>Traveler type</td>
<td>No action necessary. Field auto-populates based on profile information.</td>
</tr>
<tr>
<td>Department ID</td>
<td>No action necessary. Field auto-populates based on the department of the primary job of the traveler. Information can be changed if traveling for a different department.</td>
</tr>
<tr>
<td>Business travel begin date</td>
<td>Enter the start date for the business portion of your travel.</td>
</tr>
<tr>
<td>Business travel end date</td>
<td>Enter the end date for the business portion of your travel.</td>
</tr>
<tr>
<td>Main destination city</td>
<td>Enter a city name. If your destination is not found, email the ASU Travel Service Center.</td>
</tr>
<tr>
<td>Project/Gift/Grant/Program</td>
<td>Start typing to search for the name of the funding source for your travel. Alternately, to search for the code select the radio button CODE. Previously selected options will appear in bold at the top of the list. New options are shown below. If ASU is not paying for your trip, enter a departmental program, so that the request can be routed for approval. If necessary, this can be changed when the expense report is submitted. Use the drop down arrow to select the appropriate cost center. All cost centers connected to the selected Project/Gift/Grant/ Program are shown at the bottom of the list. Previous selections are shown in bold at the top of the list.</td>
</tr>
<tr>
<td>Cost Center</td>
<td>Use the drop down menu for yes or no. If yes, enter the personal travel dates in the comment field. No expenses should be claimed for the personal portion of the trip.</td>
</tr>
<tr>
<td>Does this trip contain personal travel?</td>
<td>Use the drop down menu for yes or no. If yes, enter the personal travel dates in the comment field. No expenses should be claimed for the personal portion of the trip.</td>
</tr>
<tr>
<td>Business type</td>
<td>Select the appropriate option from the drop-down menu.</td>
</tr>
<tr>
<td>Conference/event host</td>
<td>Enter the name of the conference host. If required by the traveler’s department, a conference brochure can be attached. A link to a conference brochure is not sufficient. Links expire and audits can occur after the expiration. If no conference or event host available, enter N/A.</td>
</tr>
<tr>
<td>Reason for trip</td>
<td>Enter the purpose of the trip. The field has a 48-character limit. If you need more explanation, continue in the comment field.</td>
</tr>
</tbody>
</table>
Requests

2. Click save.

If all information is entered correctly, you will be directed to the segments tab. If not, you will receive exceptions.

a. Red exceptions indicate information needs to be corrected and the text will provide guidance. Contact the ASU Travel Service Center for additional assistance.

b. Yellow exceptions are informational. They should be read and understood. They will remain as a permanent part of the request.

3. A travel risk advisory level populates beneath the main destination city and the travel advisory tab will appear when you click save.

If the destination city risk level is a 4 or 5, exceptions, exceptions will display and the traveler will need to click the travel advisory tab and open the travel risk advisory.

Review the provided risk information.
Requests

4. Close the pop-up window.
5. Click the traveler consent checkbox and save.

Allow for additional time for approval for trips to at risk destinations. The trip will route to the risk manager for approval.

Complete the segments and other expenses.
Requests

Request a cash advance

Cash advances available on exception basis and must be requested prior to the approval of your request. Cash advances cannot be added to a request that has already been approved.

The cash advance amount and justification is added on your request header.

If you do not see the cash advance field, email My ASU TRIP and they will add the option.

Cash advances are not approved for airfare and conference registration.
You may use the ghost card on file with the travel agency to pay for airfare and a P-Card for conference registration. Seventy-five percent of the remaining estimated expenses can be advanced and will be issued approximately 10 days from the start of your trip.
Requests

Create a rental car segment

1. Click the **car rental icon** in the **segments tab**.

2. Enter the estimated cost of the rental in the **amount field** and the pick-up **city**.
3. Click the calendar icons in the **date fields** and select the date of pick-up.
   - The departure date from the request header is highlighted in black on the calendar. If your pick-up is prior to the begin date on the **request header**, manually enter the date.
4. Explain the business need for the rental car in the **reason field**.
5. Modify the **city** for the drop-off if necessary.
6. Check the **will have completed authorized driver program prior to rental** checkbox if you will be an authorized driver prior to the rental. Traveler must be an authorized driver before renting a car.

7. Click **save**.
Requests

To make any changes after saving, click modify.
Requests

Create a flight segment

1. Click the **airplane icon** in the **segments** tab.

2. Select round trip, one way or multi-segment.
3. Enter the estimated cost of airfare in the **amount** field.

4. Enter a city name in the **from** and **to** fields.
5. Select a city from the drop-down list.

6. Click the calendar icons in the **date** fields to select your dates of travel.
   - The departure date from the request header is highlighted in black on the calendar. Manually enter the date if your departure is prior to the begin date on the header.
Requests

7. Click **save**.

Click **modify** to make changes after saving.
Requests

Create a hotel or Airbnb segment

1. Click the **hotel icon** in the **segments tab**.

![Hotel Reservation](image)

2. Enter the estimated cost of the stay in the **amount** field.

3. Complete the **city** of lodging and **estimated nightly lodging rate** fields.

4. Complete the **date** fields with the calendar icon.
   - The departure date from the request header is highlighted in black on the calendar. Manually enter the date if your check-in is prior to the begin date on the header.

5. If the hotel is part of a conference you are attending, click the **conference hotel** checkbox and attach the conference brochure showing the nightly hotel rate.

6. Use the **lookup per diem lodging rates** drop-down menu to find and document the daily lodging maximums for destinations set by the State of Arizona.
   - For a domestic location, type the 2-character state abbreviation for the state and the city where you are lodging. Some cities have seasonal rates; select the rate appropriate rate for the season of your stay. These rates are exclusive of taxes.
Requests

For an international location, type the country name and select the location and season for your stay, if seasonal rates are shown. These rates include taxes.

If you will exceed these rates and the hotel is not conference lodging, provide a reason in the provided field.
Requests

7. Click **save**.

Click **modify** to make changes after saving.
Requests

Create other expenses

1. Click the **expenses** tab.
   - The left side displays expenses you created in the **segments** tab.
   - The right side lists additional expense options that can be added.

2. To add a new expense, click the appropriate expense type and enter the required fields. Add comments as necessary.

3. Click **save**.
   - Repeat these steps for each expense you are adding.

ASU reimburses meals based on rates set by the State of Arizona. Estimate your expected meal expenses.

1. Click the **daily allowances** expense type.
Requests

- The system calculates the amount based on the destination and trip dates entered on the request header. Meals on the first and last day are calculated at 75% of the full day rate. There is no adjustment on the request for meals that will not be reimbursed. Those adjustments are made when the expense report is filed. If you want to estimate less than what is allowed under daily allowance, use the **non-standard meal allowance**. This option is used when there is limited funding for trip or long-term travel.

The date and destination fields are prepopulated from the header.

2. Click **save**. The expense appears on the left side of the page, with the estimated daily allowance for the trip.
Allocate between funding sources or add optional worktags

In cases where more than one funding source pays a travel expense, the estimated expenses can be allocated among those sources. Optional worktags can also be added to estimated expenses.

1. Select an expense in the request **expenses** tab.
2. Click **allocate**.
3. The **allocations** pop-up window appears.
4. Select the expenses to allocate.
5. Click **allocate selected expenses**. All segments must be allocated as a group.
6. Click **add new allocation** to create a new row for each allocation.
7. Type an asterisk to see a list of all available tags or begin typing and elect to search by text, code or either.

8. Click save.
Requests

Attach documents

Documents attached to the request are not visible from the subsequent expense report, but will always be accessible on the request.

Acceptable file formats:
- html
- jpg
- pdf
- tif

File size limit 5MB.

1. Click attachments.
2. Attach documents to attach a document.

3. Click browse and select the necessary documentation.
Requests

4. Click **open**.

5. Click **upload** and then **close**.

To view documents attached:

1. Click **attachments**.
2. Select **view documents in a new window**.
Requests

Submit a request

1. Click the approval flow tab.

2. Type an asterisk in the cost center manager or grant manager field.

3. Select the correct name from the drop-down list and click submit request.

   - For the cost center manager, the names shown are Workday cost center managers for the cost center entered on the request header that are also travel approvers. If you do not see the appropriate name, you may need to change the cost center or the individual you are looking for is not a Workday cost center manager or is not a travel approver. Ask your department to help identify the correct approver if unsure.

   - For the grant manager, the names shown are Workday grant managers for the grant entered on the request header that are also travel approvers. If you do not see the appropriate name, you may need to change the grant or the individual you are looking for is not a Grant manager or is not a travel approver. Ask your department to help identify the correct approver if unsure.

You are not responsible for assigning the ATO, Dean/VP or the Risk Manager.

4. One of two pop-ups appear
Requests

- A pop-up to confirm the request submitted successfully.

- A pop-up with a notification that a field requires modification. Click on the tab with the red exclamation mark to read the exception text. Contact My ASU TRIP if you need help.

Once a request is approved, you will receive an email notification from Concur Solutions. Once received you are approved to book your travel.
Copy a trip request

1. Click requests from the home page.
2. Select the trip request to copy.
3. Click copy request.

In the pop-up window:

4. Update the request name.
5. In the starting date for new request field, enter the business travel begin date.
6. Leave the expected expenses and cash advances checkboxes checked.
   o If you uncheck them, the related information in the original request will not copy over.
7. Click ok.
Requests

Modify a request

An approved request cannot be modified.

Before it is approved, access the trip request and click **recall**.

If the trip dates change by more than 48 hours, cancel the current request and resubmit a new request. Otherwise, the actual dates of travel can be reflected on the expense report.

If estimates have changed, you do not need to create a new request. Expenses not included on the request can be included and approved on the expense report by the department.
Requests

Close or cancel a request

Cancel your trip request if you are not able to complete a trip, and you do not have trip-related expenses. Complete an expense report for these circumstances:

- You incurred expenses on the ASU travel card that are not going to be credited back to the card.
- You have incurred out-of-pocket costs for which the university will reimburse you.

Close a trip request once you have filed an expense report using the request and the expense report displays a status of sent for payment.

Close requests for completed zero-dollar trips. You do not need to complete an expense report.
Booking

Book a flight

1. From the My ASU TRIP homepage, select round trip, one way or multi city.

2. Type a city or airport in the from field.
3. Select from the options in the drop-down list.

4. Repeat step two for the to field.

5. Enter the departure date in the depart field.
6. Select your preferred departure time from the drop-down menus.
7. Repeat steps four and five for the arrival field.
8. If you plan to add a rental car to your trip, click the pick-up/drop-off car at airport checkbox.
9. If you plan to add a hotel to your trip, click the find a hotel checkbox.

Choose how to find hotels based on the arrival airport, a specific address, company location, or a reference point. Enter key words in the with names containing for a further search.

10. Click the specify a carrier box to search for a specific airline.
11. Click the search by drop-down menu to select price or schedule, to choose a way to search for flights.
   1. You will review and select rental car and hotel details later.

12. A matrix appears, displaying the number of results found for each airline, categorized by the number of stops included. Click any cell for more details.
Click the shop by schedule or shop by fares to search for flights.

13. From the shop by schedule tab, click the select button next to the flight you’d like to select on the depart and return tabs. If you change your mind, click the remove link to deselect a flight.
14. Select an outbound and a return flight
15. Click the blue link displaying the price.

16. Using the shop by fares tab takes you to this screen. Click the show all details link for more information about a flight.
17. Flights priced $300 more than the cheapest flight prompt a yellow warning icon appears next to a flight option to signal the flight is out of compliance with ASU’s travel policy.
   - When you click the price for a flight that is out of compliance, a pop-up window appears, asking you to explain why you are selecting this flight. Choose a reason from the drop-down box, type your justification in the comments field and click save.

18. For international flights, any flight in compliance with the Fly America Act has an icon of a white shield with a blue checkmark above the fare amount.

19. Review the flight information and ensure your personal information is correct.
20. **Select a seat** for each flight.

**SELECT SEATS**

Select your preferred seats, otherwise Concur will request them for you based on your Profile.

<table>
<thead>
<tr>
<th>Flight</th>
<th>Seat</th>
</tr>
</thead>
<tbody>
<tr>
<td>DL 2046</td>
<td>Main Cabin (T)</td>
</tr>
<tr>
<td>DL 1115</td>
<td>Main Cabin (X)</td>
</tr>
</tbody>
</table>

21. In the **select a method of payment** field, click the drop-down arrow to select your payment option from the ghost card (ASU Paid Airfare), your ASU Travel Card that has been added to your profile or a personal card that has been added to your travel profile or you can **add credit card**.
22. Review the airline terms and conditions for the selected flight.

23. Click **reserve flight and continue**.
   
   If you opted only to reserve a flight when you began your reservation, you will receive a trip overview. From the **trip overview** page, you can add a rental car, taxi, hotel, or in-flight Wi-Fi by clicking the corresponding links in the **add to your itinerary** section.

24. Click **Next**.
   
   - If you do not book a hotel or car, a pop-up window appears to verify this information.

25. Review your selection to confirm accuracy.

26. Click **next** when finished.

27. My ASU TRIP enters in a default name for your trip. Enter the four-digit ID associated with your trip request. This can be found on the Requests page, under Active Requests.

28. Click **Next**, then click **Purchase Ticket** to finalize your reservation.

Until you click **purchase ticket**, you have not purchased a ticket.

To make any changes to your reservation, contact **Anthony Travel**.
Booking

View your upcoming reservations on the my trips list, on the My ASU TRIP home page, by clicking travel, then trip library. The trip status will remain confirmed until it’s ticketed. When ticketed, the status will change to ticketed.
Booking

Reserve a hotel or Airbnb

If you have a conference code for your hotel, book your lodging outside MyASU TRIP. Airbnb is currently booked outside MyASU TRIP and can be paid with the ASU Travel Card.

To book a hotel reservation separate from airfare or car rentals:

1. Select the hotel tab on the My ASU TRIP home page.

2. Enter the check-in and check-out dates.
3. Enter search criteria based on the arrival airport, a company location, or a reference point, specific address. Search with keywords in the with names containing field.
4. Click the add another hotel checkbox to search for additional hotels.
5. Click search.
6. A list of hotel search results based on proximity to your destination populates.
   - Green icons represent hotels matching your search criteria. Hover over green icons for more information.
   - The red icon represents the entered destination.
7. Use the **hotel chain** and **hotel amenities** options to filter results.
8. Click **print/email** to print or email a list of hotel results.
9. Click **hotel details** to open a pop-up window with hotel details.
10. Click **view rooms** to review the room policies, types and rates.
   - Rates in green can be selected.
   - Rates in gray exceed allowable cost.
11. Click the blue button with a price to choose a hotel.
12. Click the drop-down arrow in the **select a method of payment** field or **add credit card**. You can reserve your hotel with
   - Your ASU Travel Card,
   - A personal credit card

13. Click **I agree to the above rate rules, restrictions, and cancellation policy** checkbox.
14. To change your entry or reserve hotel and continue click **back**.
15. Review your reservation information on the **travel details** page and
16. Click **Next** and follow the prompts to confirm your reservation.
17. View upcoming reservations in the **my trips** list on the **My ASU TRIP home page**.
18. Review your selection for accuracy.
19. To edit a selection, click **change** next to the appropriate part of your travel.

20. Click **next** to continue.
21. My ASU TRIP enters in a default name for your trip. Enter the four-digit ID associated with your trip request. This can be found on the Requests page, under active requests.
22. Click **next**, then click **confirm booking** to finalize your reservation.
Reserve a rental car

To book a rental car without airfare, click the car tab in the **trip search** section of the **My ASU TRIP home page**.

1. Enter the pick-up and drop-off dates.
2. If picking up the rental car from the airport, enter the airport name, or begin typing the name and select an option from the drop-down list.
3. Click **search**.

4. Review the information in the pop-up window and click **OK**.

5. If the **pick-up/drop-off car at airport** checkbox is selected, the car rental results appear in a matrix based on car type, company name and price. Narrow results by clicking any cell. This expands corresponding search results below the matrix.
6. Hide the matrix by clicking **hide matrix**.
per ASU travel policy, the **standard car** option is the suggested type for all vendors.
7. Click the price to select the rental car.
   - A yellow warning icon appears when the car does not comply with ASU’s travel. Clicking the amount with the icon causes a pop-up window to explain the selection. Select a reason from the drop-down, enter the justification in the comments field and save.

8. Review the rental car information. Enter any preferences and update the driver’s information.
9. Click **reserve car and continue**.
10. Review the reservation information in the **trip details** page. Follow the prompts to confirm your reservation.
11. View upcoming reservations in the **my trips** list on the My ASU TRIP home page.
12. Review and confirm the information.
   - To edit any selection, click **change** next to travel portion.

13. Click **next** to continue.
14. My ASU TRIP enters in a default name for your trip. Enter the four-digit ID associated with your trip request. The ID is located on the requests page, under active requests.
15. Click **next**.
16. Click **purchase ticket** to finalize your reservation.
Booking

Reserve a train

1. From the My ASU TRIP homepage, select **round trip** or **one way** and complete fields. You can select to search by schedule and click **search**.

2. From the shop by schedule tab, click the select button next to the train you’d like to select.

3. Click **show all details**.
4. Review rules, hover over icons for additional information and select the fare.

5. Complete purchase. Enter payment information, reserve train and continue, click next and purchase ticket to finalize your reservation.
Expense Reports

Create an expense report header

When your trip is complete, you or your delegate should create an expense report from the approved trip request.

1. Click the blue expense link under action in the active requests section of the requests page.

   ![Image of SAP Concur Requests page]

   - If you do not see expense under action and your request status is approved, you have already started an expense report and can access it from the expense tab.

   ![Image of SAP Concur Requests page with expense selected]
Expense Reports

- If the approved trip request is no longer viewable under active requests, from the requests page, click the blue view button, then click all requests.

2. The report header page appears. Verify the trip information is correct. The information auto-populates based on the trip request. If the trip details are not correct, change the header to reflect the trip details.
Expense Reports

Add travel card expenses

1. Click import expenses.

   ![Image of SAP Concur interface]

The right side of the page lists available expenses from your ASU Travel Card indicated by the green colored card icon. All travel card transactions must be processed on an expense report and cannot be deleted.

The list also includes:

- E-receipts – should be matched to expense entries and can be deleted if not needed.
- Itineraries – should be matched to corresponding expense entries, but not required. If not added, they cannot be deleted, but the amounts can be reduced to zero.
- Receipts added to the system through the Concur mobile app
  - These can be matched to expense entries and can be deleted if not needed.

2. Click the checkbox next to the expenses related to the trip and move > to current report.
Expense Reports

3. Review the expense type assigned by the system. Update the expense type if it is not correct for the transaction.

4. Click the expense and update the expense type on the expense tab.

5. Complete fields as necessary and save. See below for the instructions concerning expense types with specific requirements.
   - **Airfare** – Airline Travel Service Code is required. Select Business Class, Coach Class or First Class from the drop-down menu. Click save.
   - **Hotel**: Add the lodging location if not auto populated. Click itemize.
Expense Reports

List nightly hotel expenses on the **nightly lodging expenses** tab. Click **save itemizations**.

Any remaining balance that needs to be itemized is shown in red. Complete the **new itemization** tab for one-time charges, such as room service, a late check-out fee or a hotel advance deposit. Click **save**.

To modify a single line for rounding errors or differing room rates, select an individual line and adjust the **amount** as necessary.
Expense Reports

When completed, the remaining balance should be zero.

If you receive an itinerary error, you may need to add an itinerary.

- **Hotel advance deposit** – Use when a deposit required for a hotel stay is paid in advance with the ASU Travel Card. The initial deposit is recorded as a hotel advance deposit. The expense type is used again when itemizing the hotel bill to account for the deposit.

- **Business meal** – The vendor, business meal purpose, and attendees fields are required. List each attendee individually. Advanced search can be used to find ASU faculty and staff. New attendee adds non-ASU individuals. The business meal purpose must explain the ASU business purpose of the meal.
Expense Reports

An itemized receipt must be attached. Itemize any alcohol and any corresponding tax and tip on the alcohol as an **unallowable travel card expense**.

- **Business Meal (> 9 attendees)** – Identical to business meal, but used if the number of attendees is more than nine and allows one entry for the group of attendees with a field for number of attendees. Attach a detailed list of the attendees along with the itemized receipt.

- **Meals on travel card** – Used for a meal paid with the ASU Travel Card. These transactions net against the daily allowance and you receive reimbursement for any difference. Claim your Daily Allowance for that meal.

- **Unallowable travel card expense** – Use for travel card transactions that are prohibited or not reimbursable. They reduce any reimbursement due to you.
Expense Reports

It is also used when itemizing an expense to remove an unallowable portion, for example, parking was $30, but only $20 is reimbursable. The remaining $10 is itemized as an unallowable travel card expense.

6. Attach receipts

Missing travel card transactions:

Do not submit your expense report if there are travel card transactions that do not appear in the available expenses. Most transactions will be in your profile within three days of the transaction, but timing depends on vendors. It could take up to 14 days for a transaction to appear. Email My ASU TRIP for any questions or concerns.

Remaining travel card transactions:

Any remaining travel card expenses should be for future approved trip requests. If that is not the case, email My ASU TRIP for help to determine the next step.
Expense Reports

Import, create or edit an itinerary

An itinerary is used to generate daily allowances and allows hotel expense entries. To add an itinerary to your expense report:

1. Click the details drop-down menu.
2. Select new itinerary under travel allowances.

If you booked your flight using My ASU TRIP, the itinerary may have been created for you.

1. Click import itinerary.
Expense Reports

2. Select the appropriate itinerary and **import**.
   - If you stayed in a location different than the one you flew into, edit the itinerary to add the leg of travel from the arrival city to the city you lodged.
   - Otherwise, click **next**.

**To enter an itinerary**

If there is no available itinerary, you must create one. Enter your departure and arrival cities in the departure city and arrival city fields. The arrival city should be the city you lodged, not flew into. You do not need to add layover legs.

1. Use the calendar icon to select the dates of your actual travel in the date fields.
2. Enter the times of departure and arrival in the time fields.
3. Click **save**.
4. Add your return trip and any legs that include an overnight stay.
5. Click **save** after each leg.
6. Click **done** after adding all legs to your itinerary.

**To edit an existing itinerary:**

1. Click the details drop-down menu and select available itineraries.
2. Select the appropriate itinerary from the pop-up window and click **edit**.

3. Check the box next to the line you would like to edit. Edit the fields and save.
4. Click **add stop** to add an additional leg. Complete fields. Click save.

5. Click **done** when complete.
Expense Reports

Create and adjust daily allowances

ASU uses daily allowances for calculating meal reimbursement. The allowances are based on preset lodging location rates and the first and last day are automatically calculated at 75% of the full day allowance regardless of the times of travel. All rates are loaded into My ASU TRIP and are based on the itinerary entered for the trip.

To create Daily Allowances, first create an itinerary. Then you can create or adjust the daily allowance as follows:

- Click the details link.
- Select expenses and adjustments.

Complete or adjust the expenses and adjustments:

1. The system assumes you should receive the daily allowance for each meal for every day of your trip. If you need to opt out of provided meals, check breakfast (check to exclude), lunch (check to exclude) and dinner (check to exclude) where applicable.
Expense Reports

Do opt out of the following meals:
  o A business meal for which you were a guest.
  o Any meal during a portion of the trip considered a personal portion of the trip.
  o Any meal served on a plane or train.
  o Meal for which you are claiming a business meal.
    ▪ you paid for yourself and other non-ASU people where you discussed ASU business and the bill is being reimbursed by the university.
  o Meals provided by a conference.
    ▪ Breakfast provided for no charge by the conference.
Do not opt out of meals because you charged them on your ASU Travel Card. Assign those charges the expense type meals on travel card and they will net against the daily allowance claimed here. You receive reimbursement for any difference. You do not need receipts for these meals.

2. Click create expenses. This adds or updates the daily allowance reimbursement claimed.
3. The expense page opens, with the daily allowance expenses on the left and the new expense tab on the right side.
Expense Reports

Add non-standard meal allowance

The non-standard meal allowance expense type is only for when you claim less than the standard daily allowance for your trip location.

Indicate in the comments what the standard daily allowance would have been.
Expense Reports

Itemize expenses – required for hotels

Hotel expenses always require itemization whether paid out of pocket or with the travel card. If the hotel charged your card in the foreign currency listed on the folio, itemize the hotel trip in that currency and My ASU Trip will perform the rate conversion. If the folio is listed in foreign currency but your card has been billed in U.S. dollars, you will need to calculate the conversion rate used by the bank and convert each line item. Contact My ASU TRIP for additional assistance.

For a hotel:

1. Enter the check-in and check-out date with the calendar tool.
   - The number of nights automatically populates.
2. Enter the nightly room rate, exclusive of taxes.
3. Add taxes and add other nightly charges under additional charges
   - Example: parking or resort fees
Expense Reports

4. Click save itemizations.
   o The itemizations appear on the left, under expenses. Any remaining amount displays in red.

5. Select the expense type for the remaining amount.
   o Example – Fees for cancellation, early or late, and one-time resort

6. If the room rate was different for any individual night, or if there are rounding errors, select any line to adjust it individually in the amount field and save.
Travel card expenses may need to be itemized if a portion is unallowable.

1. Click on the expense that requires itemization.
2. Complete any required fields.
3. Click **itemize**.
4. Select **unallowable travel card exp.**
Expense Reports

5. Enter the amount that is unallowable.

6. Select the expense type for the remaining amount and complete the fields.
Expense Reports

7. Your itemization displays on the left.
Expense Reports

Add out of pocket expenses

1. Click **new expense > expense type** to add out of pocket expenses.

![Expense Reports Image]

2. Complete fields as necessary, selecting out of pocket as the payment type and click **save** after each entry. See below for the instructions concerning expense types with specific requirements.

   - **Airfare** – **airline travel service code** required. Select the flight class from the drop down menu.

   ![Airfare Image]

   - **Hotel** – Complete all fields. **Amount** should be the total being claimed.

   ![Hotel Image]
Expense Reports

1. Click **itemize**.

![Expense Report Form](image1)

2. List nightly hotel expenses on the **nightly lodging expenses** tab and click **save itemizations**.

![Nightly Lodging Expenses](image2)

Any remaining balance that needs to be itemized is shown in red. Complete the **new itemization** tab for one-time charges, such as a late check out fee or parking.

![New Itemization](image3)
Expense Reports

To modify a single line for rounding errors or differing room rates, select an individual line and adjust the **amount**.

For additional one-time charges, complete the **new itemization** tab and click **save**. When completed, the remaining balance should be zero.

- **Business Meal** – The **vendor**, **business meal purpose**, and **attendees** fields are required. Each attendee must be listed individually. **Advanced search** can be used to find ASU faculty and staff; **New attendee** is utilized to add non-ASU individuals. The **business meal purpose** must explain the ASU business purpose of the meal. An itemized receipt is required to be attached. Do not include any alcohol or the tax and tip on the alcohol.

- **Business Meal ( > 9 attendees)** – Identical to business meal, but used if the number of attendees is more than nine and allows one entry for the group of attendees with a field for number of attendees. Attach a detailed list of the attendees as a receipt along with the itemized receipt.
Expense Reports

- **Non-standard meal allowance** – Use only when claiming less than the standard daily allowance permitted. Indicate in the comments what the standard daily allowance would have been.

- **Miscellaneous** – The comment field is required. Explain what the expense is and the business purpose of the expense in this field.

Click **save** after each entry.

The expense is added to the left side of the page, and the **total requested** amount is updated.
Add receipts or other documentation

My ASU TRIP requires an itemized receipt for airfare, business meal expenses, car rental, and lodging. Receipts are required for any other expense greater than $50 not placed on the ASU Travel Card. Departmental and funding sources may require additional receipts.

If your email address is verified in your My ASU TRIP profile:

- Email pictures of your receipts to Concur.
  - The receipt will show in available receipts
- If you booked with Anthony Travel or My ASU TRIP, receipts are sent directly to available receipts.

Concur mobile app users can take a picture through the app. The receipt then appears in available receipts.

Scan paper receipts and save them on your computer to attach.

My ASU TRIP accepts these file formats: .png, .jpg, .jpeg, .pdf, .html, .tif and .tiff.

Limit each image to 5MB.

1. Click the expense to which you wish to attach a receipt.
2. Click attach receipt.
3. The attach receipt pop-up window appears and allows you to select a previously uploaded or emailed receipt from available receipts, or browse for one saved on your computer.
4. If you uploaded receipts, you can find the images under the view available receipts. Select the receipts that must be included and click attach.

5. Click browse to upload a receipt or brochure saved to your computer.

6. Find the appropriate receipt and click open.

7. Click Attach.

8. There is now a receipt image tab on the expense page to view the uploaded items.

To attach a conference brochure, create a new expense with the expense type 07. misc travel expense: miscellaneous. Enter zero in the amount field and click attach receipt to attach the brochure.
Expense Reports

Allocate expenses to multiple funding sources or add optional worktags

To charge expenses to different funding sources:

1. Click the expense you wish to allocate.
2. Click **allocate** on the bottom right side of the screen.

3. The **allocations** window opens.
   - The left side of the screen is grayed out. To access the expenses on this side of the window, click **cancel** on the bottom-right side of the screen.
   
   - The left side of the window is now accessible. Click the checkbox next to the **date** drop-down menu to select all of the expenses. Next, click **allocate selected expenses**.
Expense Reports

4. Click **add new allocation** to add as many rows as necessary.

5. Allocate by percentage or amount, by clicking the **allocate by** drop-down menu.

6. To enter a second project, gift, grant, or program, start typing and search by text or code and a drop-down menu will appear with options to select.

7. Use the drop down arrow to search for the associated cost center.
### Expense Reports

8. Add department reporting roll, department reporting, ASU audit reporting, and academic employee optional worktags by entering an asterisk or by typing and searching by text code or either.

9. Click save when finished. A pop-up window will appear to confirm that the allocations are saved.
10. Click ok, then click done.
Expense Reports

Submit expense report

Prior to submission, review the totals from the details drop-down.

Amount due employee will be reimbursed to you. 
Amount owed company is the amount you owe Arizona State University.

1. To submit your expense report, click the details drop-down arrow, then click approval flow.
Expense Reports

2. The approval flow pop-up window will appear. To complete the cost center manager or grant manager field, type an asterisk to bring up all available signers.

3. Select the appropriate signer.

4. Click submit report. The final review pop-up window opens.

5. Click accept and submit. You will see a pop-up window indicating your report was successfully submitted or you will not be able to submit and you will see one of the two following screens.
   - Review and correct any exceptions. Email My ASU TRIP if assistance is needed.
6. Once submitted, click **close**.
   - You will be sent to the **active reports** page. The expense report's status will reflect that it has been submitted.
Expense Reports

7. When it has been approved for payment, the report will not appear on your home page and you can find it from your report library.

When your report is approved and you received reimbursement, you can close your trip request. Click requests, select the specific request and click close/inactivate request.
Expense Reports

Correct and resubmit an expense report returned to you

If a report is sent back to you, you must correct the errors or update information and resubmit for approval

1. From the home page, click the returned report.

2. To access the approver's comments, click the details drop-down and select comments.
3. Address the approver’s comments.
4. Re-enter the **cost center manager or grant manager** on the **approval flow** tab.

5. Click **submit report**. A pop-up window opens with the **user electronic agreement**.
6. Click **accept and submit**.
7. The pop-up shows the amount of your reimbursement or the amount owed to the university.
Expense Reports

Find an approved report

1. When an expense report has been approved for payment, you can find it in your report library.

2. Sort the columns by clicking on the blue column name. Click on the report name to open the report.

3. Click on the details drop down menu. Totals show you the amount to be reimbursed to you or the amount owed to the university. Approval flow shows when the report was approved for payment.
Expense Reports

Print an expense report

To print a report,

1. Click the print/email link.

2. Click ASU – comprehensive report. A pop-up window displays report details and options to email, print, or to save as a PDF file. Select PDF to print the report and attached receipts. Checking the show itemizations box includes any itemizations.

3. Click close to exit.
Expense Reports

Complete a non-travel expenses report – process travel card charges unrelated to ASU Travel

Follow these steps to reconcile a transaction for:

- a fraudulent charge and a credit to clear the charge
- an ASU reimbursable expense that is not related to travel
- use of the ASU Travel Card for a personal charge

There are two options which depend on whether or not you have upcoming ASU business travel.

Option one
If you have an upcoming ASU trip, add your transaction(s) to the expense report for that trip and follow steps four through eight below.

Option two
If you will not be traveling, create a non-travel expense report.

1. Click create new report.

2. Complete the fields in the report header.
   - The trip name must be Non-Travel Expenses. Enter the trip name as Non-Travel Expenses, or you will receive an error.
   - Select in-state for trip type, enter the current date for the business travel begin date and business travel end date, select other for business type, enter N/A for conference/event host, select no for does this trip contain personal travel?, enter N/A for public purpose and add comments for clarification.
   - Select a department project/gift/grant/program and cost center. This is needed to route the report for approval.
3. Click next.

4. Click import expenses to view a list of Travel Card transactions and move the transaction to reconcile to the expense report.

5. When the transaction is moved to the report and showing on the left, click the expense.

For a personal expense, select unallowable travel card exp in the expense type field from the drop-down.

For a fraudulent transaction and the corresponding credit, select miscellaneous in the expense type field from the drop-down.

For a transaction that is reimbursable by ASU, select the most appropriate expense type. Complete all fields and attach any documentation or receipts necessary for an ASU reimbursable expense.

6. Add an approver in the approval flow by entering an asterisk in the cost center manager or grant manager field and selecting the appropriate approver.
7. **Click** submit report.
8. **Click accept and submit** in the pop-up window.
Expense Reports

Modify an expense report

If a report is not yet approved

1. Click **expense** on the My ASU TRIP homepage.

2. Select the report to modify.

3. **Recall** the report, make the necessary adjustments and resubmit.
Expense Reports

If the report is already approved and you need to modify it due to a missed expense or correct an error. A modification expense report is required.

1. Click expense on the My ASU TRIP homepage.
2. Click create new report.
3. Enter modification in the trip name text field. Entering anything other than modification creates an error that prevents submission.

4. Complete the balance of the fields in the report header with the same information that appears in the expense report you are modifying.
5. In the comment field, include the four-digit trip ID modified with the report.
6. Click next.

7. The expenses page opens.
8. Click new expense and create a new expense with the expense type 07 misc travel expense: other supporting documentation. Enter zero in the amount Field. Click attach receipt to attach a copy of the original report you are modifying for approver reference.
9. Click import expenses and drag any travel card expense from available expenses not included on the original report.
   - For a travel card transaction left off the original report, but for which an expense was claimed on the original report and marked as out of pocket, assign the travel card transaction as an **unallowable travel card exp.** The traveler was previously reimbursed for an expense paid directly by the university.
   - For a travel card transaction left off the original report, but for which an expense was claimed on the original report and marked as pcard, assign the travel card transaction to the appropriate expense type and attach required receipts. The traveler was not previously reimbursed and the transaction has not been accounted for.
   - For a travel card transaction for a meal that was left off the original report on which daily allowances were claimed, assign the transactions as a **meal on travel card.** The traveler was previously reimbursed for daily allowances and owes money back to ASU for the meal.
   - If a travel card transaction is for an ASU business expense and was omitted from the original report, assign the appropriate expense type and add receipts as required.

10. Click new expense to add a missing out of pocket expense and complete fields and receipts as necessary.
11. Click the details drop-down menu and select **approval flow.**
12. Type an asterisk to populate available cost center managers or grant managers and select the appropriate approver.

13. Click **submit report**.

14. Click **accept and submit**.
Other

Group travel in My ASU TRIP

Most steps in the request, book travel, and expense report processes for group travel are similar to the steps for individual travel. There are some unique steps and requirements.

Group travel consists of three or more travelers.

One ASU student, faculty or staff member is responsible for request and report completion. The responsible traveler submits the request and expense report in their name and includes expenses for all members of the group.

ASU faculty or staff members may use their ASU Travel Card for group travel expenses. Regardless if multiple travelers have an ASU Travel Card, only the group member who completes the request and expense report can use their card.

ASU faculty or staff members who are the responsible traveler can request a cash advance for group travel expenses that cannot be paid with the ASU Travel Card.

Group travel with a student as the responsible traveler is handled on a reimbursement basis only.

For group travel requests and expense reports:

1. Begin your trip name with group in the trip name field.
   a. Example: GROUP – CSULB debate
2. In the business type drop-down menu select 09. team/group.
Estimate all of the group expenses in the trip request.

1. Enter the responsible party’s estimated meal cost in the daily allowances expense type.
2. Put the rest of the group’s estimated meal cost in the non-standard meal allowance expense.

Attach a **manifest** to the group travel request and the expense report. Document all travelers.

To attach the manifest to your trip request:

1. Click the **attachments** drop-down menu.
2. Click **attach documents**.
3. In the pop-up window, click **Browse** in the pop-up window.
4. Select the manifest and click **open**.
5. Click **upload**.
6. Click close once the document has uploaded.
To attach the final manifest to your expense report:

1. Select the **manifest** expense type.
2. Add the date and complete the **number of travelers** field.
3. Enter 0 in the **amount** field.
4. Click **attach receipt**.
5. In the pop-up window, click **browse** in the pop-up window.
6. Select your saved manifest document select **open** and then **attach**.
7. Click **save**.

The lodging amount for the entire group can be claimed under the hotel expense type or the other accommodations expense type, in the lodging section.

For any questions, **email** the Travel Service Center or call at 480-965-3111.
CONCUR mobile app

My ASU TRIP users can access the travel system via the mobile application. The mobile app allows you to take pictures of receipts which populate your available receipts for easier expense report completion.

1. Log into your My ASU TRIP profile.
2. Click profile settings.
3. Under the other settings tab, click concur mobile registration.
4. Get a link to download the Concur Mobile app.
   - Android
   - Apple
   - Blackberry
5. Create a PIN along with the Concur username listed on the mobile registration page.
   - Concur username is your asurite@asu.edu.
Other

Lyft and CONCUR single sign on

Link your Lyft business profile and My ASU TRIP. Receipts and trip notes will be sent directly to your profile in My ASU TRIP for use when completing an expense report.

1. Log in to My ASU TRIP.
2. Click the app center tab.
3. Search for the Lyft app and select.
4. Click connect.
5. Check the accept boxes for Terms and Conditions and Share Information and click I agree.

6. Enter in your mobile phone number on the next screen. You’ll be sent a verification code via SMS to verify your phone number.
   - If you do not have an existing business profile, you’ll be prompted to sign up for one. Click create your business profile, enter your work email and follow the steps to complete your business profile.
   - If you already have a Lyft business profile, there are no extra steps needed. My ASU TRIP will connect with you Lyft account as soon as you enter in the verification code sent to your phone.
Other

7. After signing in successfully, you’ll receive the following confirmation message.

Your Lyft Business Profile and Concur account are now connected!

When traveling with your business profile, this Lyft medal will show on your Concur. To change this, go to Settings in Business Profile > Expense Management in your Lyft app.
Other

Personal component of ASU travel

If you are adding personal time to your ASU travel, ASU will reimburse you for the ASU business portion of your expenses. ASU will not reimburse you extra costs associated with the personal time.

Do not claim or request expenses for any personal portion of the trip. ASU will not pay for a larger car or hotel room if you bring people on your trip for personal reasons. You will need to opt out of any daily allowance meals on the personal travel days. If you have an airport parking or car rental expense, only claim the portion for the business days.

ASU will not reimburse for your flight than if the personal time was not included. Attach an airfare quote from the time of booking to your airfare expense type, capturing the cost of a flight without the personal time. The airfare quote is a backup document to show the airfare you are claiming is not more expensive.

If you drive instead of fly, your car mileage expense is limited to the cost of what it would be to fly to your destination. Calculate the maximum miles that can be claimed by dividing the allowed airfare amount by .445. Attach the airfare quote to the car mileage expense as a backup for the amount being claimed.

On the request header of your trip request, **only** list your business trip dates, with the personal days listed in the comment box and does the trip contain personal travel field marked yes.

On your flight segment, enter the actual business and personal travel dates.
On the expense header, the business trip dates should be listed.
My ASU TRIP and Workday

My ASU TRIP interfaces with Workday every evening to create Spend Authorizations and Expense Reports.

Requests approved in My ASU TRIP are created as approved Workday Spend Authorizations and create a pre-encumbrance from the Request ID number. For example, request **AVCW** in Workday is listed as **Concur-AVCW**.

Open the Spend Authorization to see the trip name in the justification field, trip dates and whether a cash advance has been issued or is outstanding. If an expense report has been filed, you can open the related report.
Expense Reports approved in My ASU TRIP are created as approved Workday expense reports using the report ID. For example, Report ID 66A1E322079B4CCCBCB5 in Workday is Concur-66A1E322079B4CCCBCB5
The trip name is in the Memo field. To view the related Spend Authorization, click **Actions** for other data.
Other

Approvers can use the Report ID to search for the report in My ASU TRIP.

Academic Employee, Audit Reporting, Department Reporting, and Department Reporting Roll tags can be added by the traveler, delegate, or approver to requests and expense report in My ASU TRIP through the allocation functionality. The Program, Gift, Grant, Program, Cost Center and Trip type from the header are pre-populated and can be changed in the allocation. View Allocate between funding sources to allocate a request and Allocate expenses to multiple funding sources or add optional worktags to allocate expenses.

My ASU TRIP Approvers

To approve for a Project, Gift, or Program within My ASU TRIP an individual must be a Workday Cost Center Manager for the cost center on the header and must have the My ASU TRIP Approver PeopleSoft role.

To approve for a Grant in My ASU TRIP, an individual must be a Workday Grant Manager for the grant on the header and they must have the My ASU TRIP Approver PeopleSoft role.

View the directions to apply for a MyASU Approver role. Contact the ASU Financial Management System Workday team to be added as a Workday approver.
Expense Report Fee and Carbon Offset

The journals post based on the tags on the expense report in the allocation; not the tags on the header. If a report is funded 70/30, the fee is split accordingly to those funding sources. If a grant is a funding source, then the portion of the carbon offset allocated to the grant posts to the responsible account.

The related trip number is referenced in the JRN title if posted by the integration or in the memo field if manually posted.
System of record

My ASU TRIP remains the system of record for all spend authorizations and expense reports. Receipts and a copy My ASU TRIP documents are not available within Workday.

Other

My ASU TRIP requests with cash advances should not be split-funded. Workday cannot support split-funded cash advances and will delay the spend authorization and cash advance creation in Workday.

To close a Spend Authorization in Workday, email MyASU Trip after closing or cancelling the request in My ASU TRIP.

Review these reports to find open Spend Authorizations in Workday:

- Find Spend Authorization Lines for Organization | delete dates from spend start date fields
- Outstanding Operational Encumbrances - Departmental use
- Sources and Uses by Ledger Account | Update View by criteria to Worker
Other

Zero Dollar Trips

Prior to travel
Complete a zero dollar trip request if booking a trip for ASU business for which ASU will not be reimbursing you any expenses. This documents your travel, ensures coverage under ASU’s insurance and helps locate you in an emergency.

1. Complete the request header. Utilize a departmental account for approvals.

2. Add the zero dollar trip expense type found under miscellaneous travel expenses.
3. Select an approver on the approval flow tab and click **submit request**.

Close the request when the trip is complete. Do not complete an expense report.
My ASU TRIP icons

- The transaction was paid for with the traveler’s ASU travel card
- An e-receipt was downloaded directly from the provider
- A picture of the receipt was taken through the Concur mobile app
- A receipt is attached to the expense. Hover over the icon to view receipt
- The expense has been allocated between multiple funding sources
- The transaction is for a personal item and reduces the traveler’s reimbursement
- A comment has been added to the expense
- An airfare booking itinerary is attached – not a travel card charge
- A hotel reservation is attached – not a travel card charge
- A car rental reservation is attached – not a travel card charge
- Taxi reservation

Yellow exception. These are informational and should be reviewed and understood, but do not prevent the submission of a request or an expense report.

Red exception. This exception prevents request and expense submissions. Read the exception for directions on how to clear the exception.