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 you will present at airports. 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 when there are changes in your department or your position. The Travel Service
Profile

Center recommends you make the name change permanent by contacting the Office of Human Resources.

5. **Company information** is auto-populated from PeopleSoft.
6. Complete the optional **work address** field.
7. Enter **contact information**. A work phone or home phone is required.
8. Register your mobile device to receive Safety Text message Alerts.

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


10. Enter an **emergency contact**.
11. Complete optional **travel preferences** and **frequent-traveler programs**.
12. Enter **gender** and **date of birth**. Note: **[Required]** does not disappear after completion.
13. **Passports, Visas**, and **Credit Card** fields are optional.
Profile

Activate E-receipts

Follow these steps to activate e-receipts to ease expense report preparation.

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**.
Profile

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.
Profile

6. Scroll down to complete the **card use** section.
   - If this is your initial application, request a monthly limit of **$2500**, **$5000** or **other** for an alternate amount. Request the greatest amount of travel expenses you expect per month.
   - 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.
   - If you are changing departments check **cardholder transferred departments**.

   ![Card Use](image)

7. Review and select each checkbox in the **acceptance of terms** section.

   ![Acceptance of Terms](image)
Profile

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**

- [ ] 
- [ ] 
- [ ]

---

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 security.

4. Select PeopleSoft – Submit a Role Request.
5. Enter your ASURITE and click **continue**.

6. Explain in the **purpose for access request** field the reason for the requested role.

7. 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.

8. Click **add role**.
   - If applying for the **My ASU TRIP approver** role, you must be a Cost Center Manager or Grant Manager in Workday.

9. Select the necessary role under **human capital management – financial services travel**.

10. Click **save and return**.

11. Click **save and submit** to forward your request for approval.
Approvers

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 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.

5. For hotel, the **Allowed Lodging rate lookup** shows the state allowed lodging limits for the destination as selected by the traveler. If not completed, you can populate the field. To search for a US destination, start typing the 2-letter state abbreviation and then the city name. These rates are exclusive of taxes.

To search for an international destination, start with the country name, then city. These rates include all taxes.
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.
Click to search for and add an approver that is not part of the standard workflow.

Select the additional approver by typing in the first letter of the last name and selecting the appropriate individual.

If you do not know the appropriate ATO or Dean/VP, use the Travel Approvers Dashboard available on the travel home page.

9. The Audit Trail shows activity for the history of the request.
10. The **Travel Advisory** is an assessment of the risk associated with the main destination 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.
2. Review report summary. Amount due company is owed to ASU and will be payroll deducted. Amount due employee will be reimbursed to the traveler.

3. Click details to access menu to review report header, allocations, comments, itinerary, hotel allowed rates and daily allowances meal grid.

4. Click View, then expense type to view sorted expenses for easier review.
5. 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.

6. View receipts by hovering over the blue receipt icon. Hover over the green travel card or purple ASU airfare card icon for additional transaction information.
### Approvers

![Cheff 2015 - College Station TX](image)

### Icon Key

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Card Icon" /></td>
<td>Transaction paid with ASU Travel Card</td>
</tr>
<tr>
<td><img src="image" alt="Card Icon" /></td>
<td>Transaction paid with ASU Airfare Card</td>
</tr>
<tr>
<td><img src="image" alt="Folder Icon" /></td>
<td>E-receipt attached</td>
</tr>
<tr>
<td><img src="image" alt="Image Icon" /></td>
<td>Receipt image attached added via mobile device</td>
</tr>
<tr>
<td><img src="image" alt="Receipt Icon" /></td>
<td>Receipt attached</td>
</tr>
<tr>
<td><img src="image" alt="Allocation Icon" /></td>
<td>Expense has an allocation or optional worktags</td>
</tr>
<tr>
<td><img src="image" alt="Folder Icon" /></td>
<td>Expense marked as personal</td>
</tr>
<tr>
<td><img src="image" alt="Comment Icon" /></td>
<td>Comment added</td>
</tr>
<tr>
<td><img src="image" alt="Airplane Icon" /></td>
<td>Flight itinerary</td>
</tr>
<tr>
<td><img src="image" alt="Hotel Icon" /></td>
<td>Hotel reservation</td>
</tr>
<tr>
<td><img src="image" alt="Car Icon" /></td>
<td>Car rental reservation</td>
</tr>
<tr>
<td><img src="image" alt="Warning Icon" /></td>
<td>Denotes exceptions associated with the trip</td>
</tr>
</tbody>
</table>
7. To attach an additional receipt or documentation, click attach receipt on the appropriate

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

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. Approvers have three options:
   - **Approve** the expense report. A pop-up window appears. **Accept** the final confirmation. If other approvals are required by the designed approval workflow, insert the name of the next approver by beginning to type in the last name. Select the appropriate approver and approve. An additional pop-up window will appear confirming your approval. The next approver is notified by email.
   - **Approve and forward** sends the report to an approver who is in addition to the designed approval flow. To enter the approver, 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 by email.
   - **Send back to user** returns the report to the traveler. The traveler receives an email the report has been returned to them. They can make corrections, add clarifying comments, or attach additional documentation and then resubmit. Any comments you add in the comment field provided when you the report back are included in the email that is sent and are recorded in the audit trail.
**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 (ATO for ATO, Travel approver for Travel approver, etc.)

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**.

---

**My ASU Trip**  [Back to Table of Contents]
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**.
Approvers

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.
Requests

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**.
Requests

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**.
Create a trip request header

To be reimbursed and for duty of care, every trip requires an approved trip request prior to booking travel. The unique 4-digit id in the upper left corner of the trip request is used when booking your arrangements in My ASU TRIP.

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, descriptive name for your trip.</td>
</tr>
<tr>
<td>Trip type</td>
<td>Select 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>Previously used funding sources appear in bold at the top of the drop-down list. To utilize a new funding source, start typing (slowly) to search. New options are shown below the line and are not bold. If ASU is not paying for your trip, enter a departmental program and cost center so that the request can be routed for approval for insurance purposes. Contact your business office if you do not know this code.</td>
</tr>
<tr>
<td>Cost Center</td>
<td>Use the drop-down arrow to select the appropriate cost center. All cost centers connected to the selected Project/Gift/Grant/Program are shown. Previous selections are shown in bold at the top of the list.</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>
</tbody>
</table>
Requests

<table>
<thead>
<tr>
<th>Conference/event host</th>
<th>Enter the name of the conference host. Attach a conference brochure. 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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Purpose/Benefit to ASU</td>
<td>Describe how ASU benefits from the trip.</td>
</tr>
</tbody>
</table>

2. Click **save**.

If all information is entered correctly, you will be directed to the expenses 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 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. Allow time for their review.
Requests

Request a cash advance

Cash advances are available on an 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 or to a request that is allocated between different funding sources.

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 can add the option.

Cash advances are not approved for airfare and conference registration. You may use the ASU Airfare 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 are issued approximately 10 days prior to the start of your trip.
Requests

Estimate expenses

1. Click the **expenses** tab. The right-side lists expenses 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.

Meals: ASU reimburses meals based on rates set by the State of Arizona. To estimate your expected meal expenses

4. Click the **daily allowances** expense type.
   - The system estimates 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**
Requests

**meal allowance.** This option is used when there is limited funding for the trip or long-term travel.

The date and destination fields are prepopulated from the header.

5. Click **save**. The expense appears on the left side of the page, with the estimated daily allowance for the trip.

Lodging: ASU follows the lodging maximums set by the State of Arizona.

6. On the **hotel** or **other accommodations/Airbnb** expense type, document the maximum rate using the **allowed lodging rate lookup** drop-down menu.
   - For a domestic location, type the 2-character state abbreviation for the state and city where you are lodging. Some cities have seasonal rates; select the rate appropriate for the season of your stay. These rates are exclusive of taxes. If applying the rates to non-hotel stays, any cleaning fees are considered part of the nightly room rate.
   - For an international location, type the country name and select the location and season for your stay. These rates include taxes and all fees.
Requests

Rental car: If a rental car will be driven, it must be approved on the request prior to rental. The driver must have completed Authorized Driver Training prior to rental.

7. Check the box to indicate you will be in compliance with the requirement.

No expenses: If no expenses are being paid by ASU, you can estimate your expenses at $0.00 or use zero-dollar trip. If your trip arrangements are not being made through Concur, then prior to travel, call the ASU Travel Service Center or forward your travel arrangements to myasutrip@asu.edu.
Requests

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.
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.

![Image of a file list]

5. Click upload and then close.

![Image of a document upload and attach dialog]

To view documents attached:

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

![Image of a request form]
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.
   - If you do not see the appropriate name, you may need to change the cost center.
   - Ask your department to help identify the correct approver if unsure.

The traveler is not responsible for assigning the ATO, Dean/VP or the Risk Manager.

4. One of two pop-ups appear
   - A pop-up to confirm the request submitted successfully.
Requests

- 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 fully approved, you will receive an email notification from autonotification@concursolutions.com. Once received, you are approved to book your travel. Book your travel in My ASU TRIP in the travel tab. You will provide your unique request ID when booking in My ASU TRIP.
Requests

The request ID is also found on the request header and the list of all requests.
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.
   - 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.

- If trip dates change by more than 48 hours, cancel the current request, copy it and resubmit a new request with the current details. Otherwise, update the actual travel dates on the expense report when submitted.
- If estimated costs change, you do not necessarily need to create a new request. Expenses not included on the request can be submitted for approval on the expense report. Ask your business office if a new request is needed if the estimated expenses change significantly.

To modify a request that has not been approved, access the trip request and click recall.

Update fields as needed and resubmit.
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. You will also need to cancel any reservations you have made. Cancel hotel reservations within the cancellation policy to avoid cancellation fees or no-show fees. These fees are not reimbursable. Cancel airfare reservations prior to flight time. If you need to cancel a trip for which a cash advance is associated, contact myasutrip@asu.edu.

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

Close a trip request for completed zero-dollar trips. You do not need to complete an expense report.

Do not close or cancel your request if:

- 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.

Contact myasutrip@asu.edu if you have questions.
Booking

Book a flight

You can search for a flight any time, but prior to booking be sure the name in your Concur profile is the name on the credentials to be provided to TSA. If not, contact myasutrip@asu.edu to update your name prior to purchasing a ticket.

If you have an unused ticket that you will apply towards the purchase of a new ticket, search for the new flight and then contact Anthony Travel at asu@anthonytravel.com and they will complete the purchase for you.

Without an approved request, a booked flight is considered personal. You will need the approved request's id when booking travel arrangements. The request id is found in the approval email sent from Concur and on the manage requests tab.

You can book a flight using the steps below on a desktop computer or using the Concur mobile app.

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

2. Type a city or airport in the from and to fields and select from the options in the drop-down list.

3. Enter the date in the depart and return fields from the drop-down menus and search.

4. A matrix may appear. Click any cell for more details. If the matrix does not appear, you can show matrix.

5. Click the shop by schedule or shop by fares to search for flights. Shop by fares will show both the departure and return flights in one selection. With shop by schedule, you select the outbound and the return separately.
NOTE:

Basic Economy and Saver flights are very restrictive. They are displayed because they may be appropriate for a small portion of ASU travel, but they are not appropriate for most ASU travel. Be sure you understand all the restriction of a basic economy fare prior to booking. You are not required to book a basic economy fare because it is the least cost.

Fly America Act compliant international flights have an icon of a white shield with a blank checkmark. International travel on sponsored funding may need to be Fly America Act compliant. Ask your business office if you are unsure if your flight is subject to the requirement.

6. Click **more fares/details** for more information about a flight.
7. Review **benefits/services** to see if the fare allows bags, changes, food and drink, etc. Review **rules** for the complete list of fare rules and restrictions. Click other icons for additional details on the flight.

8. Select the flight you would like to book.
Booking

9. Review the flight information and ensure your name is the name on your travel credentials.

10. Select a seat for each flight, if applicable.

If you are flying American Airlines, preferred seats may be available to be booked for no additional charge once your flight is ticketed. Visit American Preferred Select after you receive your confirmation from Anthony Travel. In that site you enter your last name and record locator and can select a preferred seat at no charge, if available.
Booking

11. In the **select a method of payment** field, click the drop-down arrow to select your payment option from the ASU Airfare card, your ASU Travel Card or personal card that has been added to your profile or you can **add credit card**.

12. Review the airline terms and conditions for the selected flight.
13. Click **reserve flight and continue**. This reserves the flight – it is not yet purchased. Continue through the additional screens to complete the purchase.
14. From the **trip overview** page, you can add a rental car or hotel by clicking the corresponding links in the **add to your itinerary** section or review the travel details and click **next** at the bottom of the page.

15. Enter the four-digit ID associated with your trip request and click **next**.
The request ID can be found on the Requests page, under Active Requests.

16. Click Next, then click Purchase Ticket on the Trip Confirmation page to complete your reservation. Until you click purchase ticket, you have not purchased a ticket.
### Trip Confirmation

To COMPLETE BOOKING, please press the "Purchase Ticket" button after reviewing this page.
To CANCEL, press the Cancel button.

#### Trip Overview

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Name</td>
<td>Trip from Phoenix Sky Harbor Intl Airport, Phoenix, AZ to Denver Intl Airport, Denver, CO</td>
</tr>
<tr>
<td>Start Date</td>
<td>August 26, 2020</td>
</tr>
<tr>
<td>End Date</td>
<td>August 27, 2020</td>
</tr>
<tr>
<td>Created</td>
<td>July 20, 2020; Lori Boone (Modified: July 26, 2020)</td>
</tr>
<tr>
<td>Description</td>
<td>Description (No Description Available)</td>
</tr>
<tr>
<td>What is your approved 4 digit request ID?</td>
<td>TEST</td>
</tr>
<tr>
<td>Agency Record Locator</td>
<td>DERTX4</td>
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<tr>
<td>Passengers</td>
<td>Lori Dwan Boone</td>
</tr>
<tr>
<td>Total Estimated Cost</td>
<td>$170.14 USD</td>
</tr>
<tr>
<td>Additional Info</td>
<td>Airline must be ticketed by: 07/26/2020 8:30 PM Arizona</td>
</tr>
<tr>
<td></td>
<td>View your plans in Trip to stay one step ahead while traveling.</td>
</tr>
<tr>
<td></td>
<td>Agency Name: Anthony Travel (ASU)</td>
</tr>
<tr>
<td></td>
<td>Daytime Phone: 408-735-9145 - University / 480-965-2603 - Athletic</td>
</tr>
</tbody>
</table>

#### Reservations

**Wednesday, August 26, 2020**

**Flight** Phoenix, AZ (PHX) to Denver, CO (DEN)

- **Airline:** American Airlines
- **Confirmation:** Status Confirmed
- **Seat:** 22D (confirmed)
- **Departure:** 11:46 AM
- **Arrival:** 12:46 PM
- **Duration:** 1 hour 59 minutes
- **Distance:** 644 miles

**Thursday, August 27, 2020**

**Flight** Denver, CO (DEN) to Phoenix, AZ (PHX)

- **Airline:** American Airlines
- **Confirmation:** Status Confirmed
- **Seat:** 24C (confirmed)
- **Departure:** 05:39 AM
- **Arrival:** 06:56 AM
- **Duration:** 1 hour 18 minutes
- **Distance:** 626 miles

#### Total Estimated Cost

<table>
<thead>
<tr>
<th>Component</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Airline</td>
<td>$146.34 USD</td>
</tr>
<tr>
<td>Taxes and Fees</td>
<td>$23.80 USD</td>
</tr>
<tr>
<td>Total Estimated</td>
<td>$170.14 USD</td>
</tr>
</tbody>
</table>

**Restrictions**

- Nonrefundable/Nonchangeable/Fare is nonrefundable by flight time or notice.
- Ticket not yet issued. Airfare quoted in itinerary is not guaranteed until tickets are issued.

#### Remarks

Thank you for selecting Anthony Travel. Please verify all details and dates below within 24 hrs.
**After 24 hours all tickets considered approved.**
Make copies of all first/second/last names shown below exactly match the photo ID presented at the airport.
.. To reach your travel team dial 408-965-9148
- **Monday - Friday and - 999 HBT:**
- **After work emergency:** 800-742-9106

Almost done... Please confirm this itinerary.
Booking

Once purchased you will receive a confirmation from Anthony Travel with the flight details and confirmation numbers. Please review the details. Let Anthony Travel know within 24 hours if there is something that is not correct. After that time the airlines will charge change fees.

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

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.

Note: Any ticket purchased by the university is owned by the university and not the traveler.
Booking

Reserve a hotel or Airbnb

Lodging should not be booked unless you have an approved request in My ASU TRIP and lodging must be reserved in My ASU TRIP. If you have a conference code for your hotel and must book your lodging directly with the hotel or if you book other lodging that cannot be booked through My ASU TRIP, forward your booking to both plans@concur.com and myasutrip@asu.edu prior to travel. Lodging is not reimbursed if booked prior to approval or booked outside of My ASU TRIP and not forwarded to travel.

To reserve a hotel:

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, a reference point, or a specific address. You can complete **with names containing** field to limit the search results.

4. Click **search**.

5. A list of hotel search results based on proximity to the destination populates.
Booking

- Blue icons represent hotels matching your search criteria. Hover over blue icons for more information.
- The red icon represents the entered destination.
- E-receipt enabled properties ease expense report preparation. If you have verified your email and enabled e-receipts in your profile, an e-receipt is delivered directly into your My ASU TRIP profile when you check out of the hotel.

6. Use price, display settings, property brand, and amenities to filter results.

7. Click view rooms for room policies, types and rates.
   Note:
   - The room selected should be the most economical room to accomplish the business purpose of the travel and should be under the lodging rate set by the State of Arizona for the destination.
   - Prepaid and advance purchase rates are not selectable in My ASU TRIP.
   - Do not select AAA or AARP rates if you do qualify for them.
   - Govt/military rates display. Some properties consider ASU as a government entity, some do not. Reach out to the specific property for clarification if booking a govt/military rate.
8. Click **hotel details** to open a pop-up window with hotel details.

9. Click the blue button with a price to choose a room.

10. 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

11. Review the rate details and cancellation policy. Prior to clicking **reserve hotel and continue** be sure you understand the cancellation policy. ASU does not reimburse no show charges or late cancellation charges.
12. To change your selection, click **back**. To continue, click **I agree to the above rate rules, restrictions, and cancellation policy** checkbox and click **reserve hotel and continue**.

13. Review your reservation information on the **travel details** page.

14. Click **next** and follow the prompts to confirm your reservation.

15. Click **next** to continue.

16. 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 Request page, under active requests.

17. Click **next**, then click **confirm booking** to finalize your reservation.

18. You will receive an email from both Concur and Anthony Travel with the details of 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. Be sure you are an Authorized Driver prior to driving a rented vehicle and that your rental car is authorized on your approved request.

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 continue.
Booking

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**.
7. Click the price to select the rental car.
8. Rates for Hertz, National and Enterprise are negotiated rates and include collision damage waiver (CDW) and liability insurance for rentals in the U.S. and are the preferred vendors.
9. Review the rental car information. Enter any preferences and update the driver's information, if needed.

10. Click reserve car and continue.
11. Review the reservation information in the trip details page. Click next.
12. Review the trip booking information and enter your approved four-digit travel request ID. The ID can be found on the Request page, under Active Requests.
13. Click **next**.
14. Review the Trip confirmation and **confirm booking** or **cancel**.
15. After you confirm booking, your reservation will have a confirmation number and the status should be confirmed. Your car has been reserved, not paid.

16. You will receive an email from both Anthony Travel and Concur with the details of the 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.
**Booking**

**View, change or cancel a reservation**

View your upcoming reservations on the **upcoming trips** list, on the **My ASU TRIP** home page, by clicking **travel**, then **upcoming trips**.

Click on the **trip name/description** to review the travel details.

If reservations need to be cancelled, flights must be cancelled prior to departure and hotels must be cancelled in time to avoid any cancellation fees. ASU does not reimburse no-show fees.

- To cancel an air, hotel or rental car booked in My ASU TRIP, click **cancel**.
- To change a hotel or rental car booked in My ASU TRIP, click **change**.
- To change a flight, email Anthony Travel at ASU@anthonytravel.com.
Expense Reports

Create an expense report header

When your trip is complete, you may need to 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 and the expense report will be started for you.

2. If you do not see expense under action and your request status is approved, your expense report has already been started.
Expense Reports

Review expense report header

Click the expense report from the expense tabs.

From the details drop down, select report header.

Verify the details. They were populated from the request. If the trip dates changed from the request, update the dates to the actual dates of travel. If the funding source changed, that can also be changed.
# Expense Reports

## My ASU Trip

<table>
<thead>
<tr>
<th>Report header for: Concur Fusion 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Name: Concur Fusion 2020</td>
</tr>
<tr>
<td>Employee ID: 1000004991</td>
</tr>
<tr>
<td>Project/Grant/Program: (PG02914) FS-Tempe Opera</td>
</tr>
<tr>
<td>Does this trip contain personal travel? Yes</td>
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<tr>
<td>Comment:</td>
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<tr>
<td>Report Id: 3B0C0C0B0C3A473A6520</td>
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<tr>
<td>Business Travel Begin Date: 06/22/2020</td>
</tr>
<tr>
<td>Business Travel End Date: 06/23/2020</td>
</tr>
<tr>
<td>Business Type: 03. Training</td>
</tr>
<tr>
<td>Conference/Event Host: Concur</td>
</tr>
<tr>
<td>Trip Not to Exceed:</td>
</tr>
<tr>
<td>Public Purpose/Benefit to ASU: We are attending to learn about the best practices across higher</td>
</tr>
<tr>
<td>Department ID: 022046002 FS Travel</td>
</tr>
<tr>
<td>Cost Center: (CCC029) FS-Financial Serv</td>
</tr>
</tbody>
</table>

## Back to Table of Contents
Add travel card expenses

1. Click **import expenses**.

The right side of the page lists available expenses from your ASU Travel Card indicated by the green colored card icon. If airfare was purchased with the ASU Airfare card, the transaction is indicated by a purple colored card icon. All 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. If the hotel is not listed in the vendor field, you can enter the name.
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. An itemized receipt must be attached. Itemize any alcohol and any corresponding tax and tip on the alcohol as an unallowable travel card expense.
Expense Reports

- **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.

![Business Meal Expenses](image)

- **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.

![Meals on Travel Card](image)

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

![Unallowable Travel Card Expense](image)

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**.
Expense Reports

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 for 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.
   o 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.
   o 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. The first and last day meals are automatically calculated at 75% of the full day allowance regardless of the times of travel. Opt out of provided meals, check breakfast (check to exclude), lunch (check to exclude) and dinner (check to exclude) where applicable.
Expense Reports

Opt out of the following meals:
- A business meal for which you were a guest.
- Any meal during a portion of the trip considered a personal portion of the trip.
- Any meal served on a plane or train.
- A 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.
- 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.
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.
   - The itemizations appear on the left, under expenses. Any remaining amount displays in red.

5. Select the expense type for the remaining amount.
   - 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.
7. If the transaction is for a hotel advance deposit. 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.

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**.
Expense Reports

4. Select **unallowable travel card exp.**

5. Enter the amount that is unallowable.
Expense Reports

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

7. Your itemization displays on the left.
Add out of pocket expenses

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

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

1. Click itemize.

![Expense Type and Transaction Date Form]

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

![Nightly Lodging Expenses Form]

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 Form]
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.
Expense Reports

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. A valid receipt includes proof of payment, date of purchase, details of what was purchased and vendor name. A lodging receipt should include the address of the lodging location.

- Take a picture of your receipt with the Concur mobile app. The receipt will show in available receipts and when imported to an expense report, will complete most fields automatically for you.
- Email your receipt to receipts@concur.com if your email address is verified in your My ASU TRIP profile. The receipt will show in available receipts and can be attached to an annually entered expense or travel card transaction.
- Scan paper receipts and save them on your computer to attach to expense entries. 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.
Expense Reports

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.
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.

![Expense Report Details](image)

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.
Expense Reports

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.
Expense Reports

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.
Expense Reports

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.
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. The ASU Airfare card can be used to purchase airfare for all group members. Regardless if multiple travelers have an ASU Travel Card, only the group member who completes the request and expense report can use their ASU travel card for expenses.

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.
Other

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**.

If the ASU Airfare card was utilized to purchase flights, import the transaction into the expense report. If you do not see the airfare transactions for the travelers, contact the ASU Travel Service Center before submitting the report.

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

![Lyft app center](image-url)
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.

   o 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.

   o 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.

![Confirmation Message]

*Your Lyft Business Profile and Concur account are now connected.*

When linking rides with your business profile, the Lyft receipts will automatically be sent to Concur. To change this, go to *Settings > Business Profile > Expense Management* in your Lyft app.
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 more 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.
Other

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.
Other

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](mailto: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.
Other

My ASU TRIP icons

- The transaction was paid for with the traveler's ASU travel card
- The transaction was paid for with the ASU Airfare 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

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.

The flight is Fly America Act compliant