School of Geographical Sciences and Urban Planning
Arizona State University

Concur Travel Instructions

Below is a step by step guide to using the My ASU Trip/Concur system. If you have any questions or encounter problems, please email memonte5@mainex1.asu.edu.

Access the My ASU Trip system manual here.

Access the SGSUP Travel Resources here.

First Time Users

If this is your first time traveling with ASU, you must create a travel profile at least **5 weeks** before you travel. Use the Profile Request Form to request a travel profile. See the SGSUP Travel Resources for more information. It usually takes 3-5 business days for your profile to be approved. You may not receive notification that your profile is completed. You will need to log in to see if your profile was created.

Creating a Trip Request in Concur (before you leave)

1. Calculate the total amount of money available to you from SGSUP, Grad College, other ASU academic units and/or grant resources that you will be able to apply towards the trip. Please consult the SGSUP Student Handbook and any offer letters you may have received. If you have received travel money from any ASU source, you will need to attach documentation confirming these amounts**. This documentation/information is required for both the pre-travel request and post-travel expense report. Only one trip request is needed even if you have funding from multiple departments.**
2. After receiving your Travel Profile, login to the My ASU TRIP webpage.
3. Click “Create Request”.
4. The Request Header is where you enter basic trip information; destination, dates, purpose, etc. Fill out all of the required information.
    a. Enter cost center as **CC0639** unless provided an alternate by the Business Operations Team.
    b. In the box marked “Project/Gift/Grant Program”:
        i. Enter the grant code provided by the PI if the trip will be funded entirely by a grant.
        ii. PhD students - enter PG11856 if you’re using school funds
        iii. MUEP students – enter PG06418 if you’re using school funds
        iv. You will be able to amend the exact accounts to which various expenses are charged at the time you submit your expense report.
    c. In the “Public Purpose/Benefit to ASU” box give a simple & brief answer such as “Attend/present at XYZ planning conference.”
    d. In the “Comment” box

   i. If you expect to use multiple funding sources, please give a brief breakdown in this comment box (ex. SGSUP PGXXXXX $500; grad college PGXXXXX $500; Dr. Smith PGXXXXX $500).
   ii. If you are taking any personal time, comment the dates that will be personal time. **Do not** include personal time in the header date range.

e. Once all the required boxes are filled out, click "Create Request" in the bottom right hand corner.

5. Now that the request is created, you can start adding expenses. Click the "Add" button in the top right corner of the "Expected Expenses" box. Fill out the appropriate information including the estimated cost of the expense. Add any needed comments. Click "Save" and repeat the process for every expected expense.
   a. Meals must be requested using the "Daily Allowances" expense. After entering your business travel start and end dates and your destination, the estimated expense amount will automatically be calculated.
   b. Rental cars must be pre-approved by **Maria Bellamy**. You must be an approved driver in the ASU system – this can take several weeks.
   c. If your conference registration was paid using a P-card, add a "Conference Registration" request for $0 and comment "$X was paid on a departmental purchasing card". This amount will be subtracting from your approved funding amount.
   d. For Airfare, if you are adding any personal time to the trip, please add a comment detailing when you are flying out for personal time and when you would have flown out if you were to only attend the conference.
6. Once your expenses have been added, you need to add attachments to your request. Click the arrow next to "Attachments" located above the "Expected Expenses" box. Click "Attach Documents". The following documents are required:
   a. **Conference Brochure** – A document that included the **dates, name, and location** of the conference. This can often be taken from the conference website.
   b. **All Funding Approvals** – Usually in the form of an email. Includes the account to use as well as the approved amount. MUEP funding must be approved by both **Matthew Gomez and Maria Bellamy**. PhD funding must be approved by both **Christopher Clanahan and Maria Bellamy**. Include approvals from all funding sources even if they are in another department.
   c. **Supervisor Approval** – An email exchange of you asking your supervisor for approval and an explanation of how attending this conference will benefit your research and your supervisor approving the travel and justifications.
   d. **If you are adding any personal time to the trip, please attach price quotes for two fares – one for your actual dates of travel and one as if you travelled only to attend the conference.** You must use the cheapest available flight for your comparison on the business travel dates. **You will only be reimbursed up to that amount.** Please keep this comparison quote to attach to expense report along with the airfare receipt.
7. The final step before submitting your request is to edit the approval flow. In the top right corner, click "Edit Approval Flow". Enter **Medley Montero** as the Cost Center Manager.

   a. If you have funding from another department, click the 3 dots to the right of Cost Center Manager and select "Add below this step". Add the approvers for your other sources of funding.
8. Once you have entered all of these items and there are no error messages, hit the red "Submit Request" button in the upper right corner.

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

Once you receive notice that your trip is approved: book your airfare, hotel, registration, and transportation. You will need digital (PDF) copies of everything you purchase. They must clearly show the amount that was paid, date of purchase, dates of travel. ASU will not reimburse for airplane seat upgrades (business, first-class or early bird check-in) or personal travel time (days added to a trip that are not directly connected to the reason for travel).

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

Creating an Expense Report in Concur (when your return)

When you return from your trip you must complete an Expense Report in the MyASU TRIP/CONCUR system **within 10 days** of returning or you may lose funding. This is especially important for Grad College & GPSA travel awards.

1. Login in to the system the MyASU TRIP/CONCUR System.
2. Select the "Create Expense Report" box at the top of the page.
3. Select "Create From an Approved Request" at the top of the page. Select the correct trip request.
4. Confirm/re-enter all of the information is correct in the trip header and select "Create Report".
5. For your first expense, select "Manually Create Expense". Select the correct expense, fill out the required information, and attach the receipt. From here, the rest of your expenses will be added using the "Add Expense" > "Manually Create Expense" buttons.
   a. If you used an ASU Travel card or booked any flights or hotels through Concur, these will be added using the "Add Expense" > "Select from Available Expenses" buttons.
   b. In order to add Daily Allowances, you must create an itinerary using the "Travel Allowance" > "Manage Travel Allowance" buttons.
6. Required Expenses
   a. **Conference Brochure** – a $0 expense with the conference brochure **and** conference schedule attached as the receipts.
   b. **Other Supporting Documentation** – a $0 expense with all of your funding approvals attached as receipts.
7. Do not forget to upload your receipts on each expense using the "Upload New Receipt" button on the right-hand side of the screen. You do not need receipts for Daily Allowances (daily food spending).
8. Review and resolve all alerts and errors in the report.

9. Once you have entered all information, uploaded receipts make sure the Total Amount is within your funding limit budget. **Requests submitted above the approved budget will be declined and sent back.**
10. Click “Submit Report” in the top right corner
11. Once submitted, you will receive email notifications about the status and approval or denial of your Expense Report.