Liz’s Introductory Guide to Concur (My ASU Trip)

Disclaimer:
If anything doesn’t work like it’s supposed to, or doesn’t make sense, let me know.

For frequent travelers (multiple times a year) travel expenses are meant to be paid with the ASU Travel Card (this is not a p-card, do not confuse the two). Travel cards are requested and issued to each of you individually, and paid directly by ASU. (Directions on how to request a travel card of your very own are below). All Travel Cards must be approved by Lev via email prior to requesting one in the system.

Once you have your travel card, you are never, ever to use it to pay for anything that is not directly related to an officially approved ASU Travel Expense (there are, naturally, consequences for breaking this rule). I cannot overemphasize this point. The most common mistake is for a personal Uber or Lyft to be accidentally charged to your Travel Card. Please be careful if you upload your travel card to your account(s).

For those who travel infrequently (less than once per year), it is recommended to pay for your trip out of pocket (with the exception of flights, which are direct paid by ASU when purchased via the Concur system), and be reimbursed after the Expense Report. If this is not possible, you can request a Travel Card, but when you are not in travel status it must be turned in and kept by the admin team. And again, all Travel Cards must be approved by Lev via email prior to requesting one in the system.

NEW STREAMLINED PROCEDURE FOR TRAVEL APPROVAL (Most important thing you will read all day):
1 – You are given emailed approval from Lev to attend a conference or some other travel (this requirement as of July 2021). This email must include justification for your trip and state what safety precautions you will be taking. This email must be attached to your Trip Request in Concur (see #2).

2 – You must put in a Trip Request in the My ASU Trip system, and this must be fully approved before you can make any purchases related to the trip (purchase registration or flights or reserve hotel). Making any travel related purchase (flight, registration, hotel reservation) in any way or with any method of payment without a fully approved request in the My ASU Trip system is a violation of procedure and will cause a red flag and audit. Do not cause a red flag and audit. It can also mean you do not get reimbursed for your travel expenses, so take this seriously.

3 – Once the trip request is entered and fully approved in the My ASU Trip system, then you can go ahead and pay for registration/flight/hotel. Flights can be purchased directly through Concur when you put in the 4 digit ID of your approved travel request. It is just as easy as purchasing flights via any other website with the priceless bonus of it being available in your post trip expense report without you having to do anything extra. Your hotel must be reserved through Concur. This is the case even if you were to pay with a personal credit card. The only exception to the rule of booking via Concur is if you have to book a conference hotel via the conference website to get the conference rate. If you do that, you must email a copy of your hotel reservation to My ASU TRIP MyASUTRIP@exchange.asu.edu.

There’s an app for that:
Smartphone users can download an app that will let them access the system (and take pictures of any receipts and upload the expense from their phone). See below for instructions.
So, what am I supposed to do about all this?
Go here https://cfo.asu.edu/myasutrip and do these 4 things:
1 – Fill out your My ASU Trip profile. (NOTE: if you put in your rewards numbers for airlines etc, the system is supposed to automatically put those in when you purchase flights through Concur, and you will get miles, etc)
2 – List your admin as Travel Assistant & Arranger.
3 – Make your admin a request and expense delegate.
4 – If you are a frequent traveler, get emailed approval from Lev and request a Travel Card. Note: It can take a few weeks to get the card once you have requested it, so give yourself a month to six week’s lead time to request the card prior to needing to purchase a registration or hotel reservation.

How To, With Pictures:
https://cfo.asu.edu/myasutrip (or via MyASU’s Travel Link)
Fill out your Profile and add your admin assistant as Assistant/Arranger/Delegate:

Click on your Profile

Note these 4 links:

1. Click **Personal Information**. Do not click Save until you complete the next few steps.
2. Verify that your name matches the information on your driver’s license or passport.
3. Enter a work or home phone number in the Contact Information Section. Add a new device if you want to enter your mobile phone.
4. Click “How do I verify my email address?” and follow the instructions in the Email Addresses section.
5. Complete the Emergency Contact section.
6. Complete the Travel Preferences section (this is where you enter your frequent flyer information). Add your birthdate and gender in the TSA Secure Flight area. Click Save.
7. Add your personal Travel Card (once you have it) in the Credit Cards section. It will be used to reserve your hotel through the Concur system.

8. **Add your admin as a Request Delegate** and an **Expense Delegate**. (See Image Below) Complete the Expense Delegates or Request Delegates section that is linked on the left side of the page closer to the top. This allows your admin assist with your travel, so trust me, this is important. (Note: Concur may have changed this part, but my screen still looks like the below)

9. Do the **Mobile Registration** for your smart phone

Request delegates:

![Request Delegates Image]

Make sure all available boxes are checked in both Request Delegate and Expense Delegate and click **Save**

![Delegates Image]
Request A Travel Card:
https://cfo.asu.edu/myasutrip

Once you have emailed approval from Lev to get a Travel Card:

Click the link:

ASU Travel Card

A chip-and-PIN-enabled VISA card is used for official university travel expenses billed and paid for by ASU.

- Includes Travel and Emergency Assistance and Auto Rental Collision Damage Waiver Program.
- Incurs no foreign currency transaction fees.
- Integrated into My ASU TRIP.
- Issued to an individual.
- Transactions expensed following expense report completion.

Eligibility and application Before use Policies Using your card Limit or department change Leaving ASU FAQs

The ASU travel card is available to faculty and staff. Departments determine participation based on business need.

- If eligible, apply through the Travel Card application. Review application detailed directions.
- Expect to receive your card five-to-10 business days after ASU Financial Services approves the application.
- Email notification is sent when the card is on its way.
Put your admin in as Department Contact.
On the next page add your phone # and the Primary Travel Account (ask your admin if you don’t know).
On the next page list your admin again as Account Signer, and Farnoosh Niknam as Dean/VP approval.

Then click all the agree buttons and submit.