

Alright, well thank you again for joining us today. Again, my name is Catherine King, and I am in the Mary Lou Fulton Teachers College in their business Ops Office. And so today, we're just going to kind of go over the trip request and hopefully make it a little bit easier, not quite such a frightening little experience to get on to concur and get this done. So, this particular training just, you know, it is

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aimed more at faculty and staff, with graduate students, there is a different training that's being done for them. Okay.

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So, a lot of the questions that we have with a trip request is one: Why is there a trip request.

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What is the process. And then there are just some common questions that we hear, and so we're going to touch on that at the very end.

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So first of all, let's talk about why it's needed.

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So it's not just a matter of, oh, you work for ASU. And you're just going to go out on a trip to a conference or you're going to go visit a school in Africa. There's just a little bit more to that, this is business travel. So this is not personal travel.

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If I'm doing personal travel, I make my own budget. I make my own plans, I go when I want to, I return when I want to and the IRS is not going to come back and audit me for my personal travel.

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However, when we do business travel as soon as you are claiming those expenses and being reimbursed for them now ASU and MLFTC, Mary Lou Fulton Teachers College,

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Can be audited for all of the expenses that you have been repaid.

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So they want to make sure that all the documentation is in order. Because we have to be able to handle those third party auditors for up to 3, 5, 7, or 10 years

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And then we also have internal auditors over in travel, so we want to make sure that everything's there.

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Now the other item to keep in mind is when you're doing business travel, if you happen to fall. Hopefully you won't, but if you happen to fall stub your toe, break a leg, anything like that,

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ASU needs to know about that because they are covering for Workman's Comp and different insurances. The other thing that we have experienced recently is some foreign travelers have

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Apparently had their hotel surrounded by rioters, and so then we had to involve the State Department. Again, if there's no trip request done prior to the trip,

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then ASU doesn't even know their employee is in that country or in that hotel. So this is another aspect of why we do need to know with business travel where you're going, when you're going, and why you're going.

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Now the allowable expenses, as you all know, if you're doing personal travel you pull out that MasterCard, you look at your balance and you say okay I got \$5,000 I can spend

3:08

Great. If you're doing business travel, guess what ASU, and Mary Lou Fulton Teachers College is doing the same thing. You mentioned where your funds are coming from. And ASU and MLFTC wants to look at one.

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Does that particular funding source allow you to use your funds for travel. For instance, with grants, sometimes grants

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Only will cover certain expenses and so we just need to make sure, How do you plan on paying for your travel and is that an allowable expense.

The business purpose. This is where oftentimes if you've done a trip request, we've probably sent it back to you and said, hey, could you give us some more robust business purpose. Well,

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I can understand as a business traveler, that if I'm going to a convention and I'm presenting. I'm probably going to put the business purpose line.

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Look, I'm going to the conference. I'm presenting. Whoo. It's business travel. Well again we have third party auditors that are kind of come in and look at that and say,

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Okay, so you presented it took you what 10 minutes to present and you were gone three days, give us a little bit more. So that's why we're not picking on you but asking for just a bit more because we don't know. Maybe you're networking. Maybe you're building ASU's

4:27

Brand. Thank you.

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In different areas. So you're pushing number new fault the teachers college different aspects of that.

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So whatever your business purpose is figure if you've actually kept it to about 40 characters you have not given us enough information and we are going to send it back and ask for

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More robust explanation. Again, not to pick on you, but because we do need to be able to hand that to an auditor for the next three to five years, we'd rather not contact you when you're on a golf course in five years, and ask you what you were doing in October of 2019.

5:02

I don't think you want to be bothered with that either.

5:05

Now funding verification. Again, that's just a matter of making sure similar to allowable expenses is the money there. We've had people say, Oh, we'll just use my discretionary funds.

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That's fantastic. We don't mind using your discretionary funds but sometimes you've already spent your discretionary funds and you didn't realize it.

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And, you know, buying supplies or whatever. So we just need to make sure that what you think is there is actually there and that you're covered

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Now coverage actually refers to. If you're faculty are your classes covered if your students have a question. Who are they going to reach out to

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If you are staff your department is probably sending you, but in the off chance that they're not. And this is something that you're seeking to help

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Expand your own professionalism that we do need to know that your work is covered, while you're gone, that your desk is covered, and so that's what that References

6:03

So those are some of the different reasons why we do need the trip request. Now when it comes to travel expenses. This actually was a headline on April 19 of this year.

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And it was not Mary Lou Fulton teachers college. Thank you, that it wasn't. However, we also want to continue to just follow the policies and procedures in the trip request and trip expenses so that we don't end up in the headlines for misuse of travel expense funds.

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So then what are the steps for the pre approval. Why do we say, hey, please don't give us your trip request at six o'clock and catch the flight at seven.

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We can't get you approved that quickly. We would love to, but we can't because there's so so many people involved in the process of business travel

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Pre approval. That's pretty much just you going to your director, Sherman Dorn, or you're going to your own supervisor or the VP and you're saying, hey,

7:06

May I Go on this business trip. They're going to tell you that you're approved or not approved, you're going to go ahead and submit your request and

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And then we're going to review it so that cost center managers are the people in the business operations office that are reviewing it.

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And then the approvals. So we're going to give you the approval, but our approval doesn't matter. It has to go to the to

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The ATO, the ATO is going to give her approval or she's going to send it back and ask for one or two more items and never we just want to make sure that we're not sending it back so we can save everybody time in frustration and get these trip requests. approved

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Now when you're thinking about who's involved. Well, of course the Traveler that's that would be you that's traveling

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And then, of course, your division director or your supervisors. So if your faculty is probably going to be Sherman Dorn if you are staff, it's going to be whoever your supervisor is

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And you're just getting approval from them. I'll show you later what that looks like. It's a very simple email, you're saying, hey, I'm going to be gone. These are the dates. This is what I'm doing here is the business purpose.

8:09

And this is the funding source that I would like, you're saying what your coverage is and literally you're getting a one word back if you use Sherman he'll just right approved. If you're using one of

8:19

Your staff and you're using someone else they might give you a full sentence, rather than just approved, but that's all we need. Cost center managers. Those are the ones that are kind of like the

8:31

Think of it as when students come to ASU, and they have an advisor for their particular degree program. So think of the cost center managers that way.

8:39

We're here to help you. We're here to review what you've turned in. Make sure nothing's missing will reach out to you by email if there is anything missing to try and pull this together.

8:49

As far as the authorized travel official. That's the ATO for Mary Lou Fulton teachers college that is Kim row.

8:57

And what Kim row is doing is, again, if we're looking at it as like a student with ASU. She would be the enrollment board. She's looking at it from a point of view of is ASU covered is Mary Lou Fulton Teachers College covered and if it's a grant is everything good there.

9:15

If you're going to a high risk destination or if you plan on spending more than \$5,000, then we have to

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Include so we're already up to four people in this process, we have to include the fifth one that's going to be either the dean or the VP for approval of anything over \$5,000 or approving your trip. If you're going to go someplace where you could get killed.

9:39

On the risk management side that's also for high risk destinations. So again, if you want to go someplace where they're having lots of riots, there may be kidnapping people things like this.

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It's not a real warm, fuzzy space, you have to go through risk management office.

9:55
If you are planning on traveling to one of these high risk destinations and you give us two days you probably are not going to be approved for your trip.

10:04
That doesn't mean you can't choose to go on it, but it can mean that as you're not going to cover it as a business travel

10:11
So that could affect your wallet, you do want to make sure that you're at least giving us well preferably a few months notice, but if it is one of those last minute items then last minute to us if it's a high risk destination is

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It has to be at least two weeks because we absolutely can't get on board shorter than that. There's just too many things to look at.

10:34
Now, some of the common questions that we face

10:38
So what happens after the trip is submitted. Can I immediately booked my travel. well we ask is that with a trip request until you actually have that stamp of approval. Please don't actually spend your money.

10:52
Because until you have that stamp of approval for the business travel, you actually

10:57
Are like that teenager that's talking to their parents saying, Hey, can I borrow 150 bucks for this.

11:03
And then goes ahead and spends 150 bucks but doesn't actually have approval yet. Guess what he's gonna be doing extra chores.

11:10
We don't want that to happen to any of the faculty or staff here. We don't want you using your own personal money if it is business travel so please put off actually spending money till you have your approval.

11:22
Now, what do I need to indicate or attach when I'm including my personal travel with an ASU trip.

11:29
So a lot of times people will say, oh, gee, I'm going to this conference in North Carolina and my sister lives in North Carolina. I'm going to go ahead and go a couple days early include some personal travel

11:39
That's fine. Let's say that your business travel actually starts on the 10th, you're going to go ahead and go on the fifth

11:47
That's great, personal travel is involved. What you need to include is a list of comparable flights.

11:55
attached to your trip request that show what you would have spent on airfare had you traveled on the 10th instead of on the fifth

12:06
As you know, when you come around the holiday time there are days that are significantly more expensive to travel than others. And ASU will not cover it if it's going to be two or three times the cost, they're going to cover what the business travel costs would have been

12:26
Not the personal travel costs.

12:29
Now is a trip request required if I'm traveling for asu so it is a business travel, but I'm not claiming an expense.

12:37
Yes, actually the zero dollar trip requests are required. And so then if we if we can circle back to the second slide when we talked about liability.

12:49

Don't you want to know that if you break your leg or if the plane, you know, decides to land on the leg and you have to go for a swim and maybe get some hypothermia involved or anything like that. You want to know you're covered

13:00

And the only way that's going to happen is if ASU knows you're on a business travel trip, even if you're not going to claim expenses. So there is a process for doing it. Your request that just doesn't have expenses, you're basically doing the header

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It's not that difficult. We just ask that you still do it so that we know where you are. Okay, so that is the little introduction to why we do a trip request and

13:27

So this is where that the PowerPoint is done. I'm going to open the floor out for questions and if you are in Tempe poly or somewhere else, please do feel free to ask questions and we'll see what we can do to answer.

Poly Campus - Participants

13:45

What's the radius on the no cost business travel for it to be applicable where you're covered under ASU

West Campus - Main Speaker

13:53

So as long as you are an ASU employee and you are doing business travel

14:02

That is zero dollar you are covered under those things like the accidental death.

14:09

The workman's comp, things like that. And so what you're going to include is

14:15

For instance, most often we see conferences. So I'm just going to use that as an example, if you were to attend a conference, but you're going to cover all the costs yourself. You're going to include

14:26

Simply that approval letter, showing that your Sherman Dorn or your director knows you're going to be out of the office and that your classes are covered. And you're going to include the conference brochure.

14:38

But you don't have to include anything else. Just make sure that you've included a comment in the actual trip request saying that it is zero dollar. You're not planning.

14:46

On claiming any expenses. That way we know enough to contact you and say, hey, you seem to have forgotten your airfare and your hotel. So, so just, you know, put a comment in there so that we're not bothering you.

Poly Campus - Participants

14:58

What if it's a local conference.

15:00

What's that? what if it's a local conference., even in Phoenix. How far would the travel need to be to necessitate us submitting that request.

West Campus - Main Speaker

15:15

Right, so then it normally if it's not

15:18

Overnight stay

15:20

Then you don't need a trip request.

15:23

There is

overnight stay. You need a trip request. Does that make sense. 15:23

I will tell you this, it is difficult in Phoenix, it is you do have to provide some good narrative as to 15:30

Why you need to spend the night in Phoenix, if you live in Phoenix and work in Phoenix, and it could be as simple as the commute, you know, hey, I live in Queen Creek, the conferences in Peoria. Okay, or vice 15:39

Versa. But more than that, because again, you're not actually explaining this to us, you're claiming it 15:54

Poly Campus - Participants 16:10

Or when we send it back out. 16:13

...To see 16:33

Nicole. Okay, so who would reach out to Nicole to and she she oftentimes will reach out to us in the business operations office just to make sure 16:35

That everything is covered. If your staff. I know that Kevin in recruitment. He doesn't do it, but he said that he goes to Goldman and Goldman goes ahead and checks all the funding to make sure the funding is there. Um, 16:44

Yeah. YOLANDA does a lot of it. Lori, Daisy and I do a lot of it. 17:01

Are there any other questions. 17:14

Poly Campus - Participants

Sorry, is that when we aren't using any funding from ASU. What do we put in like under the project gift or grant program or it used to be. There used to be a number that we had to do, how do we find out what number or what to put in there. 17:20

West Campus - Main Speaker

So I'm looking over at Daisy, to see if she has a comment on that just a second here. 17:38

Unknown Speaker

So, 17:47

Again, you can always 17:52

Find out what 17:55

Poly Campus - Participants

Okay, that was really hard to hear. So I needed all done again. 18:00

West Campus - Main Speaker

Yeah. Not a problem. So, um, so what she was saying is that you know like each each department has like a general account. 18:03

18:13

Business Account. And so if you don't know what that is. You can always reach out to your supervisor and they'll know what it is. Or you can call us at the business office and we'll go ahead and look it up for you. 18:25

Or you can just take your 18:26

Email because 18:34

You're on West Campus. 18:52

Gotten better with respect to intuitive understanding concur. 18:59

Frustration has nothing to do right not understand what I'm supposed to do. It has everything to do with and stupid software that you're making 19:10

And how unintuitive that is now, it may be worthwhile maybe while to do a two minute YouTube video on how the hell we use that 19:24

Is bound to save 19:27

And your family members. 19:30

They might 19:32

Only do it, we do it once a year, twice a year. It's not like we do this all the time. So therefore, we really would be very helpful to do that. 19:40

And I understand some people don't want to be bothered, I would do that. If you get something like that I would do that to learn the ins and outs. Okay, even though I only use it once or twice. 20:00

Might be told us for certain towns and no 20:08

small chunk. 20:12

Training. Like, I don't, I don't really feel the need to completely come to a training today but 20:19

I know I have some gaps and understanding 20:25

Really related to the software. I think what she's going to do in just a moment as take us through the keys. 20:34

And then we can break that up and hopefully make some videos up that we make, go back and do some smaller chunk out of 20:44

Their choosing reduces 21:00

Alright, so. Are we all good all around. If so, we're going to move on to the Concur part 21:05

Going to say yes alright so 21:15

Go from here share 21:18

Okay. 21:22

All right. Do you all see my ASU page.

Tempe - 402k

21:26

Yes.

West Campus - Main Speaker

21:39

Go ahead and just make it a little bit bigger. Alright. So for those of you who do not know if you are my ASU you simply come under the my employment and hit travel

21:42

But what we're doing it this

21:56

We're going to do two things. Right now we're going to first go to the travel system, the travel system is called concur and we're getting there. And we'll walk through the process of doing a trip request.

22:14

But I have been asked by both Ray and Kim to quickly kind of introduce everyone to the travel system page prior to going to concur. So if you'll just give me a moment. I'm going to act like your little tour guide for a second.

22:25

When we are, oh my goodness that little mouse. Alright, so when we open up the travel page. I want you to look over on the well for me. It's on the right hand side.

22:25

Hopefully, it's the same for all of you. We've got the my ASU trip access. That is how you actually get to the trip request you've got information on the travel card for any of you that have a travel card.

22:42

We have the travel policy, we have a lot of people that ask about well, is this covered or is that covered

22:49

Such as alcohol, no, alcohol. It's not covered. So, it states that in the travel policy. Then we have department resources we have traveler resources. We actually have a step by step ASU trip manual. It's 135 pages long of goodness

23:11

Step how to do anything and everything on concur. And then the US passport office so

23:22

All hundred and 135 pages. So now on the Traveler region. I'm just going to take you down this real quick because because I've been asked to so on that page.

23:40

You're going to find all sorts of information. If you are planning on going to a high risk destination or even to Mexico or Canada.

23:49

foreign travel go under that page and look at all the different things that ASU and risk management need you to consider so that they can make sure that you are covered and that you know where to go. If any kind of emergency happens

24:06

I have only been with university since March, but I will share this in a prior

24:13

Position with Prudential corporation. We actually had a lady that was down in Mexico just having a nice time in Cabo. This is a perfectly safe location they were in a beautiful retreat.

24:25

However, she tripped and fell against a picnic table and ended up with 17 surgeries to put her face back together.

24:41

Now I am not suggesting that that would happen to anyone that was like the odds of winning the lotto type thing, however.

24:49

It's that one off that you want to make sure that you're covered and that your employer knows where you're at. So please, if you're doing foreign travel

24:55

Hit that link and study all about it. Make sure you give us enough time to make sure you're covered

25:09

This also has links to the basics about the trip the quick reference guide the travel manual and then you'll also find all sorts of information, like how to rent a car or, you know,

25:09

who to call. If you need to contact someone at the State Department, all that kind of wonderful stuff is found under that link. So again, that's under traveler resources.

25:22

So with that, unless you have any questions about those links. I'm going to go ahead and start on concur. Does that sound good.

25:31

So I'm real quick I again you access it here. You're my asu you go to travel, you hit my asu trip access

25:42

Today, only for the purpose of this training. I'm accessing it a different way, because I don't want to actually start a trip request. This is just so that the travel department knows it's just a test.

25:59

I should be able, we tried this yesterday at work.

26:14

All right. Does everyone see hello Sparky and sap concur. Yes.

26:23

When you initially hit that that tab. So if we're back over this tab and we hit the my asu trip access

26:34

You're going to be brought to concur, I concur is a software up third party platform that many corporations use worldwide.

26:45

The reason that the trip request portion is not as intuitive as you mentioned earlier.

26:53

With, like the trip expense portion is because concur wasn't originally designed with a full trip request process asu had them designed it specifically for that.

27:07

So, so it's not completely intuitive with the expense report, but it'll get you there. So today, again, just the trip request. I'm going to come up here to this black banner I'm hitting request.

27:26

And going to go ahead and do a new request.

27:35

Did you have a question.

27:38

Or was that as

27:40

Someone Talking Okay. All right, so

27:45

You're doing was I like to do is I like to make sure that I've done my homework first

27:50

So what do I mean by that, that you know what the name of the conference is. You know what city it's in you know the date surrounding it. And that you've at least looked at maybe what airfare might cost and whether or not you'll be staying at a conference hotel.

28:04

Maybe what that might cost. The more information you have before you start the process, the faster it's going to go for you.

28:11
Now this trip name. This is how this is like you labeling a file. If any of you are old enough to remember having actual paper.

28:20
Files that you kept in a drawer. Maybe you named it something so this trip name that so you can find that file again in the future. So today, I'm just going to put

28:33
Test B

28:36
You can name it whatever you want. If you are going to CEC conference. A lot of people will just go every year. So they'll put CEC 2019 or CEC 2018

28:48
Or whatever. So it's that trip name is the one thing in here. That is all for you. It's not for anyone else.

28:57
Now the trip type

29:01
So are you going out of state international in state. If you are with Mary Lou Fulton. Teachers College. You are never clicking number for your only clicking one, two or three

29:15
So today. The example I'm using is a conference in South Carolina. So I'm going to go ahead and click out of state.

29:24
Now, as to the software. I want you guys to notice I'm actually when I come over here I'm using the drop down and I'm using the mouse to click. this is not a program that understands tabs and enter

29:41
So you really need to save yourself the frustration and just love on your mouse to move from field to field.

29:50
OK, so my business travel begin date. So when I look

29:56
Sorry. Alright, well I'm looking over here. Oh honey covered all my attachments

30:17
Working through some technical difficulty. There we go. Alright, so

30:27
This is a particular example that I just picked online. What's that

30:34
Oh,

30:51
Okay. Now, do I have you on board the sixth global service learning

30:57
Summit. Does everyone see that

31:03
You can see it. Good. Excellent. So when I'm looking at this, I'm looking at the fact that I've got. Okay, I've got the name of the conference, and I've got where it's at. And then I've got the dates.

31:16
So with that information. I'm just going to go back over here to concur.

31:20
Is everyone back on the Concur trip request header.

31:25
I'm going to assume yes because I'm not hearing anyone

31:31
OK, so the business travel dates. I'm the conference starts on the third

31:39
Now, this again is the trip request. And so I don't have to be exact here because I haven't actually bought my ticket yet. But what I'm going to do is I'm going to go ahead and select

31:50

November second, the day before the conference begins, just to make sure that if I need to play with flight some I'm already covered. I got that all taken care of.

31:59

I'm going to select is the travel end date it ends on the fifth. I'm pretty sure I can grab a flight out that evening, so I'm going to go ahead and grab the fifth is the end of my business travel

32:20

Oh, yes. And this is concur everyone isn't it awesome.

32:27

Yes.

32:30

All right.

32:32

And you can just easily move in and out. What a deal.

32:38

Yes, it makes you so happy because you get faster, each time. Okay, so let's go ahead and grab

32:47

November second, we're gonna go through November 5

32:56

Destination city so

33:00

I'm going to start typing and it's going to start giving me some options.

33:06

You see this Clemson South Carolina right there. Again, I don't get to just hit Enter. I have to actually click on it, in order for it to fill itself.

33:19

Now I'm pointing at this travel risk advisory low level one. That's what you need to be aware of. If you are traveling internationally and you see this trip travel risk advisory hit level three or above. That's when you have to involve risk management and you have to involve the dean.

33:46

When you get to this program, gift, grants, whichever way you're going to get your funding. I want you to notice that in concur, it's asking you to fill the project number first, not the cost center that can be a little bit frustrating for some people but just so you know.

34:11

Is it not number one.

34:21

Again, I'm waiting for concur to tell me

34:25

That it's got the program that I just selected and going to click on it.

34:30

That really is one of the biggest frustrations for people in first. They want to hit tab or enter you can't. You really do have to actually click on it with your mouse.

34:39

Notice it automatically fills the cost center, so I don't need to touch that. Does this trip contain personal travel, we are not going to play with personal travel today. So I'm going to put no

34:53

With the business type. Nice and simple again.

34:58

I hope you all are noticing I'm literally just hitting the down arrow, each time. I'm not trying to come up with my own ideas. I'm just going to let concur tell me what kind of verbiage, it wants.

35:14

Now the conference event host the host is not always the same as the name of the conference.

35:21

So if we were to just switch back over here.

35.25

Looks like we've got the sixth global service learning summit.

One World inclusion transformation. I'm going to call it the sixth global service and call it good. 35.30

This business purpose. And when you're in this box. This is where I just went on and on. A few minutes ago about how your business purpose needs to be two to three sentences, please give us a robust business purpose. 35.50

And here's the little caveat in the actual box for your business purpose. It only takes like 40 characters. So you can say 36.03

anything at this point, but it takes about 40 characters. 36.14

There we go. That's good. 36.21

But so what we asked 36.26

We ask that here in the comment box that you actually expound there. So when you get that request sent back and you're thinking, hey, it didn't take the characters I put in as much as I could. Well, just go to the comment part, stick it all in there. 36.30

I'm going to just circle back real quick to this trip, not to exceed if you put a number in there. We assume that you do not want us to approve anything that's over that number. 36.46

Otherwise, leave it blank. Let us do our job, we'll do what we can to try and get you the best that we can. At the end of the day, so I have one. I 36.59

Have a group of people that keep putting 700 in here. 37.10

And once they put in 700 that tells me I can't approve anything over that and they're sending me trip request for 15 and 1600 dollars and I'm trying to figure out which costs. Do you want me to cut 37.13

So, so if you have not been told by your superior that you can't exceed a particular amount. Then let us do our job to advocate on your behalf for your trip, just leave it blank, it'll auto fill later. 37.25

Last comment before we move forward in this comment section again two to three sentences for your business purpose. And if you selected yes under personal travel 37.40

You would put your personal travel dates in the comments section. 37.54

Not in the business travel date portion 38.01

Okay, so we can go ahead and move on forward two segments. 38.06

Now the segments. As you can see that airplane train car and hotel. What's the segment well 38.17

The segments reference expenses, anything you put in under this tab is going to show up under expenses. 38.23

Here's the thing. Whenever you're traveling, there's going to be certain expenses that are expected to occur with travel and they're expected to be the larger percentage or the larger segment. 38.29

Of the budget for that travel. That's all this is referencing. So we're going to go ahead and hit airplane, because we're going out of state. 38.41

Are going to do round trip. 38.49

I've already done my homework. I've looked at flight. So I know I can get a flight for right around \$358 38.56

39.00

I'm going to be going from sky harbor, but I'm just going to go ahead and type in Phoenix, as I type it in. Look at all those airports that come up

39.10

Again, this is concur, we do not hit enter, we click and it'll fill

39.18

We are going to

39.21

Greenville

39.24

South Carolina. There we go. Spartanburg

39.31

And the date

39.33

Notice it automatically has highlighted that second because it knows that that's when my business travel starts

39.42

I'm just going to click on it to let the system.

39.44

Know that. Yeah, I'm good with that.

39.49

I'm going to go ahead and click on the fifth for the return

39.56

Hit save

39.59

when I hit save. I just want you to notice up here. Now my trip request has a has a four digit code.

40.06

Let's say, as soon as you get approved. Let's say this trip is approved by tomorrow you are ready to go. You can start buying airfare and and getting your hotel all set up.

40.16

Use this four digit code when you call Anthony travel or when you hit the travel portion of concur, you can get all of the discounts. As you discounts employee discounts by using Anthony travel, which is the, the humans behind

40.34

The travel portion of concur or you can just go to the travel section here in concur to buy the products, but you want to go ahead and use this four digit code, hang on to that that's the one that's going to tie everything together in the end.

40.49

All right, we have our airfare taking care of the other large segment that we look for if we don't see it and you don't leave us a comment. We send the trip request. Back to you, that has to do with where you're sleeping at night.

41.00

We not want a few employees sleeping on the street. So we would like you to put something in here. Now let's say this particular conference is 150 a night. So we're planning on being there for four nights three nights.

41.17

Throw in 600

41.25

150 a night

41.34

There we go.

41.39

All right, and wants to know the dates. Again, we're going to start with the second estimated night.

41.48

And I'm going to put it's a conference hotel. Now what happens if you are staying at a conference hotel. But it's more than the per diem.

41.57

That is going to be the only exception that ASU is going to have for going ahead and covering that cost that is more than the per diem cost if you do not check conference hotel, then we have to just shoot it on down to the actual per diem amount 42.14

Now the checkout date. I'm going to go ahead and head home on the fifth 42.22

Down here is where I'm doing the per diem. What was that 42.30

Yeah overflow. So the question was, if the conference hotel is booked and you have to use an overflow hotel. Is that acceptable. 42.38

It is please provide comments about it because we do look at conference information and if the hotel you stay at is not listed, then we don't know what you've done. So you just need to let us know. 42.54

On the per diem. This is where I'm just going to go ahead. I'm going to click either. Notice that where I'm going, is not here. 43.03

So I'm going to put in South Carolina. 43.08

And then I'm going to look for my city. 43.16

Not seeing it. I'm gonna go ahead. Grab Charleston. Obviously, I do not know. 43.22

South Carolina really well, but we're going to go with it for the purpose of the test. There we go. 43.28

Now we've saved that here I can allocate funds, I can delete my entry or I can modify. So if you need to make any edits or revisions and always hit that 43.41

We're good to go. So we're just going to move right on to expenses. Now I know you see these six tabs, but for the trip request and you're the Traveler, which is what we're doing today. 43.53

You're almost done. All you gotta do is finish up this page. 43.58

Do some attachments and we're good to go. I want you to notice here. Look, your airfare and hotel from segments, it's already been brought over 44.06

What other kind of expenses. Do we want to see. Well, the big one is going to be a conference registration. So I'm just going to go ahead and type that in here. 44.20

And I can look down there is a conference registration. 44.31

When I click Save. It's going to be added over here to my list. 44.37

The other thing I might want is, I might want a taxi. 44.44

Whatever, I'm typing into this expense type up here. Just going to show me that I can do that. And I'm just going to put in 44.53

50 bucks. I don't know what the taxi is going to cost, but at least I had some cash aside for it. Are you going to park at the airport at Sky harbor or someone going to drop you off. If you're going to park, you might want to include a reimbursement for parking 45.13

And parking is about \$12 a night. And I'll just go ahead and save estimated 48 if I'm under that. That's fine. 45.25

And then finally, I want to make sure I eat. I like food. I'm going to put in daily allowances here.

45.35
It's so important that back on the header, you did your business travel not personal travel in the business travel dates do you see that it auto fills.

45.46
It also auto estimates. So again, if I'm back here on the request header and I'm looking at the business travel begin and end dates that is not where you put personal travel. If you have personal travel dates.

46.01
Put them in the comments.

46.04
Because the business travel begin and end date does affect your daily allowances.

46.14
I don't think I saved daily allowances before I took off on that little squirrel trail so

46.21
Put that in again,

46.28
All right. All of that shows. Um. Oh, that's good airline fees, you see that if you think you're going to spend 30 or 50 bucks on luggage.

46.35
You can always put that in. Now you don't have to get super picky on putting in each and every expense on this page.

46.43
But what we're looking for is you got to have some sort of reference. If it's a conference have some sort of reference to the conference registration.

46.52
Have some sort of reference to where you're going to lay your head at night and have some sort of references to how you're going to get there airfare, car, whatever.

47.00
Those big ones that we're looking for. Even if you're not going to ask for that reimbursement later at least let us know you're covered

47.08
Let us know if there's an earthquake in the area and the Hilton Hotel goes down that we know you're staying at the Radisson not the not the Hilton, give us something to get off of so that we can find you.

47.18
Make sure you're taken care of. Okay, so this is all set. And now all I need to do is add my attachment

47.29
So I'm just going to click attachments up here. I'm going to click attach documents.

47.36
And browse

47.43
It's gonna be here. Thank you.

47.47
Alrighty, so right here. Global Learning Conference. That's my brochure. So please understand in the travel policy, it asked for a brochure. There was a day and time that some of you may not remember where actual

48.01
trifles were usually typed up for different kinds of conferences. Now you just go to the website you pull up the website you're right click it and you save it to your desktop. So you have that attachment

48.18
I hit upload

48.22
And that is done and now I just want to make sure that I have my approval email from my

48.30
Supervisor. This is literally how simple it is. I want to attend the XYZ conference. These are the dates of the conference. This is where it's located

48.40

This is my plan on leaving in and returning. I'd like to use department funds my classes are going to be covered by whatever. Do I have your approval to attend and approved. That's all we need, save it as a PDF attach it to your request.

49.05

Here again, just browse

49.10

Grab my approval.

49.13

Upload it

49.16

And close

49.21

So as simple as that. You now have everything you need for your trip request.

49.29

It's the approval flow.

49.32

And if you don't know who your cost center manager is who are you supposed to send this trip request to you may get it all done and you think, Oh for Heaven's sake, who do I send it to

49.43

Well, if you just hit your asterisk a list is going to come up again. I'm on the test site so it doesn't show everyone's names. If you are here on the west side, just go ahead and put in Lori hands down. She's the one that that usually distributes

50.00

The workflow for the trip requests for this particular test, I'm literally just going to grab Lori Beene

50.10

And I am all done. If I want to I can go ahead and print this from work day for my own files, my own records, I can print my attachments. So I know what I actually attached

50.25

I can check my attachments. I think I attach them, are they all there. Well, yes, everything's there, approval letter, the brochure. We're good to go.

50.40

And and yes and it's yes we will we will communicate with you. Now I just hit Submit Request

50.50

Going to tell you it's been successfully submitted, it takes you automatically back to all of your open requests. So if you are someone who likes to travel a lot, you will see several different

51.03

Trip requests. And so you see the request name here that's backup that header where you name the trip, whatever you want, because it's for your records. So I know by looking at this test A that's what I was playing with last night at home test B is what we're doing here today.

51.19

Here's my request ID so that I know when I want to go ahead when I get the approval and I'm ready to buy those airfare tickets or I'm ready to go ahead and reserve that hotel.

51.29

I have my request ID right there to go ahead and give to Anthony travel or to use when I'm on that travel page right here. So with that we are all done. Do any of you have any questions.

51.43

For you...

51.47

Well you gotta we have to have a preliminary

51.52

Yeah, for your actual request for the trip request, you do need to have a little bit you need you need to do just a little bit of research. Now, when you're on ASU travel

Since we're pretty much done with the mic and Kurt portal. Go ahead and hit this 52.08

When I come up here. I can hit travel here to purchase. But if I just want to review. Hey, I'm doing this trip request today, but I'm really not sure what it's going to cost me and I want some ideas. 52.15

I can put in my departure and my two right over here, and it will go ahead and fetch me a list of different prices that I could expect to spend and I can just use that 52.27

Any other questions. 52.41

For research prices. 52.45

You don't. You don't have to, but it's all on one page so it 52.49

Well, there you go. 52.56

Yeah, from last week's call, All use the same, but the plus with Anthony travel when you do get approved and you can start to spend is that they do. They do. You know what ASU's 52.58

discounts are so, so for instance, there's some car rental places that give you an automatic 25% off. 53.13

There are hotel chains that will give you X amount off southwest and American Airlines specifically have different contracts with ASU to give us significant discounts on their airfare 53.19

Anthony travel has access to that if you're going if you're going outside of that to Expedia or Travelocity you are just going to get their prices. 53.33

Alright, thank you. Catherine 53.45

54.00