

Concur – Tracking and Reporting on All Expenses Related to a Trip

Process: A department may have a need to track and report on all expenses related to a trip. The Related Request/Expense Report field can be used by the department to add a common identifier for a traveler’s trip to each expense.

PROCEDURES

Determine how each department wants to identify expenses related to a trip.

In many departments, travel expenses such as airfare and registration fees are booked through a central office. Also, due to timing of transactions being charged, it may be necessary to allocate some transactions prior to the travel dates. This will lead to expenses related to a trip being allocated on multiple reports.

Expenses can be linked together through reporting by entering a naming scheme or other internal tracking ID assigned by the department in the Related Request/Expense Report field.

The screenshot displays the 'Details' tab of a Concur expense entry form. The form includes the following fields and values:

- Expense Type ***: Parking
- Transaction Date ***: 06/01/2020
- Trip Purpose ***: 07. Other Travel
- Trip Type ***: Domestic
- Traveler Type ***: 01. Employee
- Vendor Name**: (Empty)
- City of Purchase**: (Empty)
- Payment Type ***: Paid by Employee
- Amount ***: (Empty)
- Currency ***: US, Dollar
- Transaction ID**: (Empty)
- Related Request/Expense Report**: 06/01/2020-Nelson-Cincinnati, OH
- Comment**: (Empty)

At the bottom of the form are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'. To the right of the form is a receipt preview for the University of Kentucky, showing the logo and the text 'UK Lockup-286 (002).jpg' and 'Detach'.

Concur – Tracking and Reporting on All Expenses Related to a Trip

<p>NOTE: For accurate reporting, be certain to include this information on every travel expense in the Related Request/Expense Report field.</p>	<p>Naming Scheme Suggestions:</p> <ol style="list-style-type: none">1. If the traveler has created a Concur Request, enter the Request ID.2. For departments with internal request systems, use the internal request number assigned by that system.3. Use the last date of the trip-last name of the traveler-conference name. <p>Related Request/Expense Report ?</p><input type="text" value="06/01/2020-Nelson-Conference ABC"/>4. Use the last date of the trip-last name of the traveler-business destination. <p>Related Request/Expense Report ?</p><input type="text" value="06/01/2020-Nelson-Cincinnati, OH"/>
--	--