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**

<table>
<thead>
<tr>
<th>Determine how each department wants to identify expenses related to a trip.</th>
<th>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.</th>
</tr>
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<tbody>
<tr>
<td>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.</td>
<td><img src="UK-Landscape-2010-002.jpg" alt="Image of Concur interface" /></td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>NOTE: For accurate reporting, be certain to include this information on every travel expense in the Related Request/Expense Report field.</th>
<th>Naming Scheme Suggestions:</th>
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</table>
| 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. |

```
Related Request/Expense Report
06/01/2020-Nelson-Conference ABC
```

4. Use the last date of the trip-last name of the traveler-business destination.

```
Related Request/Expense Report
06/01/2020-Nelson-Cincinnati, OH
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