

# UAF Travel

## Friday's Concur Tips, Tricks, & FAQ's

19 July 2019

### Today's Concur Tips & Tricks: What should I enter in the Trip Name field?

At times a trip request or expense report may be returned with a request to change the report header trip name. Using the recommended naming convention helps traveler's easily identify their trips in Concur. It also assists fiscal techs and financial managers to identify Concur charges in Banner.

Examples of Incorrect Trip Names:

- "Nasa group meeting"
- "Field work for project"
- "Teaching a class"

Instead, the Trip Name should include the traveler's last name, dates of travel, and destination.

Examples of Correct Trip Names:

- "Thorsen, D 7/19-22 Houston, TX"
- "Tape, C 8/2-12 Tok, AK"
- "Matthews, A. 9/17-29 Bethel, AK"

If the name in the report header is entered correctly it will appear in both the Request Library in Concur, and as a charge line in Banner. The naming convention includes the three most useful identifying pieces of information for any trip (Name, Dates, Destination). If you get stuck, hover your cursor on the blue arrow above the field (these are called tool tips) in Concur for a hint.

The screenshot shows the 'Request' form in Concur. The 'Trip Name' field is highlighted with a red box and has a blue arrow pointing to it. The field contains the text 'Smith John J 15-26 Jul FAI SEA'. Other fields include 'Trip Purpose', 'Trip Description', 'Trip Type', 'Traveler Type', 'Final Destination', 'Business Travel Start Date', 'Business Travel End Date', 'Will this trip include personal travel?', and 'Personal Travel Dates'.

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