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, and it helps fiscal techs and financial managers do the same 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.

Always remember, if you get stuck, hover your cursor on the blue arrow above the field (these are called tool tips) in Concur for a hint.