

## **CONCUR TRAVEL AND EXPENSE MANAGEMENT TRAINING AND RESOURCES CHECKLIST**

*(Links embedded)*

### **TRAINING – myUK Learning**

- Introduction to Concur Travel and Expense Management
- Concur: Expense Reporting for Procard Transactions
- Concur: Creating a Travel Request
- Concur: Creating a Travel Expense Report without a Travel Request
- Concur: Approval Process and Workflow

### **COLLEGE RESOURCES AND POLICY**

- CAFE Travel Expense Reimbursement Resources
- CAFE Concur Travel Reimbursement Quick Reference Guide
- CAFE Procard Policy

## **UNIVERSITY FINANCIAL SERVICES - QUICK REFERENCE GUIDES**

### **GETTING STARTED**

- Concur Getting Started - Review and Complete User Profile Settings
- Concur - Setting Up/Updating/Deleting Delegates
- Concur - Personal Car Management and Claiming Mileage
- Concur - Update Default Cost Object

### **CREATE TRAVEL + NON-TRAVEL EXPENSE REPORTS**

- Concur - Which Policy Should be Used?
- Concur - Create and Submit a Travel Expense Report without a Request
- Concur - Create and Submit Procard Allocations on the General Expenditure Policy
- Concur - Itemization and Allocation

### **OTHER EXPENSE REPORTS**

- Concur - Personal Non-cardholder Expense
- Concur - Personal Cardholder Expense
- Concur - Payments on Behalf of Students

### **EXPENSE REPORT HELP TIPS**

- Concur - Printed Expense Reports
- Concur - Attachments and Receipts
- Concur - Icons
- Concur - Tracking and Reporting on All Expenses Related to a Trip

Additional resources: begin with your department business staff and visit <https://www.uky.edu/ufs/concur-travel-expense-management> for more resources.



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### **WORKFLOW**

- Concur - Workflow and Report Tracking
- Concur – Approval
- Concur - Adding an Additional Review Step
- Concur - Acting as a Delegate

### **PROCUREMENT CARD**

- Concur - Exceptions on Procurement Card
- Concur - Fraud and Dispute Procurement Card Transactions

### **DEPARTMENT BUSINESS OFFICE**

- Concur - Review Concur Expense Documents in SAP
- Concur - Tracking and Reporting on All Expenses Related to a Trip
- Concur - Expense Report Information Available in SAP

### **OPTIONAL BUT HIGHLY RECOMMENDED (REQUESTS)**

- Concur - Create a Travel Request
- Concur - Create and Submit a Travel Expense Report with a Preapproved Request

Additional resources: begin with your department business staff and visit <https://www.uky.edu/ufs/concur-travel-expense-management> for more resources.

