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

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