

# CONCUR TRAVEL AND EXPENSE NEWSLETTER

December 17, 2020

## PROCUREMENT CARD DOCUMENTATION STANDARDS:

### DOCUMENTATION

All documentation must support the propriety of the transaction and contain the following information:

- Vendor Name
- Detail listing of purchase, including item description, quantity and price
- Total dollar amount of the purchase
- Transaction date
- List of attendees (when necessary)
- Business purpose/explanation for purchase

### WHAT IS A BUSINESS PURPOSE FOR A PROCUREMENT CARD TRANSACTION?

A business purpose is a statement that adequately describes the expense as a necessary, reasonable and appropriate business expense. When using University funds, documentation of a clear business purpose is required so that an approver, reviewer and/or auditor may reasonably conclude and agree that the expenditure supports or advances the goals, objectives and mission of the University. Providing a valid business purpose is a requirement for Uniform Guidance and University policy.

The 5 “Ws” (Who, What, When, Where, and Why) can be used to determine if the documentation and business purpose meet the University standards for procurement card documentation. Read more about the documentation standards in the [Procurement Cardholder Manual](#).

### CONCUR PROCARD TRANSACTION REPORT IN TABLEAU

The Concur Procard Transaction report in Tableau is a tool for business officers to use to review unposted procard transactions. The report contains the following filters: Department, Is Posted to SAP, Employee, and Concur Status. The business officer should select only those department numbers that report to them in the Tableau filter. Select only NO for Is Posted to SAP. The other filters should default to ALL. The report can be downloaded to a spreadsheet by choosing Download – Crosstab. The data can then be sorted and reviewed for older transactions that have not been added to reports and to review for reports that have not been submitted or are not being approved timely within the departments.

### CLAIMING MILEAGE FOR TRAVEL

Mileage reimbursement can only be claimed from the employee’s home or remote workstation if the distance between the home and the business destination is less than the distance between the employee’s official workstation and the business destination. Note: employees cannot claim mileage for driving between the employee’s home or remote workstation and the employee’s official workstation. See [BPM E-5-1](#), Reimbursement of Travel Expenses.

## QUESTIONS??

Questions or requests for assistance should be emailed to [concurexpense@uky.edu](mailto:concurexpense@uky.edu). Emails should be as detailed as possible and need to contain screen shots when appropriate to assist with responses to your questions. Due to the high volume of emails received, please allow 3-4 business days for a response.

Visit the [UFS Concur Travel & Expense Management](#) website for Concur Quick Reference Guides and FAQs.

On-Demand Videos related to Concur processes and procedures have been uploaded to myUK Learning and can be viewed at any time. To access these videos, login to myUK and go to the Employee Self Service tab. Select myUK Learning and search for the “Concur” videos. The On-Demand videos include demos such as creating a general travel request, travel expense report, procard expense report, and the approver process.

To see past issues of the Concur newsletter please click [here](#).