

CONCUR TRAVEL AND EXPENSE NEWSLETTER

November 23, 2020

RECENT CHANGES:

A new training video has been published in myUK Learning titled "Concur: Review and Complete User Profile Settings."

CONCUR PLANNED MAINTENANCE

Concur will be completing system maintenance and will be experiencing intermittent down times and limited access on Saturday, December 5th, 2020.

REMINDERS:

WHERE DO I ACCESS TRAINING?

There are two main training methods for Concur: On-Demand Training Videos and Quick Reference Guides. The Quick Reference Guides can be found on the [UFS Concur Travel and Expense Management](#) website. The On-Demand Training Videos have been uploaded to myUK Learning and viewed at any time. To access the videos, login to [myUK](#) and go to the Employee Self Service tab. Select myUK Learning and search for the Concur videos.

DON'T FORGET TO CREATE YOUR DELEGATES

A procard holder, traveler, supervisor, or business officer can add delegates to create reports or assist with approving reports. Every cardholder or traveler is required to approve his/her own procard or travel reports even if a delegate created the report. For approvers, it is important to maintain your delegates especially during extended absences. Please see the [Setting Up/Updating/Deleting Delegates Quick Reference Guide](#) for procedures and definitions of delegate permissions.

TOP 5 ITEMS FOR APPROVERS TO WATCH FOR DURING REVIEW THAT COULD CAUSE THE REPORT TO BE RETURNED:

1. The procard transaction does not include a business purpose. See the [Procurement Cardholder Manual](#) for the definition of a business purpose.
2. The procard documentation does not contain an itemized receipt. See the [Procurement Cardholder Manual](#) for the procard documentation standards.
3. The procard documentation attached to the expense does not match the expense amount.
4. The travel expense report does not contain a business purpose.
5. Discretionary expenses need to be allocated to discretionary funds per [BPM E-7-10](#).

QUESTIONS??

Questions or requests for assistance should be emailed to 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 being 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.