Welcome to our training on approving university credit card requests in Concur.
This video is specific to two groups: business liaisons who will review credit card requests to ensure all details are correct and department heads who will determine, for new card requests and permanent limit change requests, if the request can be approved at the department level.
In addition to requests for new cards, the card request is used to request changes to existing cards,
1) New Card
2) Close/Cancel Card

including closing the card,
changing the credit limit associated with the card,
1) New Card
2) Close/Cancel Card
3) Limit Increase/Decrease
4) Reissue/Replace Existing Card

reissuing a card,
1) New Card
2) Close/Cancel Card
3) Limit Increase/Decrease
4) Reissue/Replace Existing Card
5) Update Name

or updating the name on the card due to legal name changes or—in the case of vehicle cards—changes in the person identified as responsible for the card.
The screen that allows you to manage the request will refer to Expected Expenses because of Concur’s prototype request set-up. For our purposes with the card request, the details in this list are not expected expenses but the card request details.
This list will tell you if the request is for a new card, a limit change, a name update, etc. Clicking on this card detail line
opens the details window
where you can see the type of card requested,
and whether the limit requested is the standard limit
or a nonstandard limit.
For business liaisons, part of the review process should be to ensure that the card product type and the monthly card limit amount correspond.
If they do not match, the request will need to be sent back for correction.
Also look for alerts or warnings displayed at the top of the screen that identify any missing information.
For both business liaisons and department heads, if additional information is needed, and it can be added as attached documentation or a comment, the employee is able to add that attachment or comment without the card request being sent back. Documentation and comments can be appended to a request at any time,
but if the request gets sent back to the employee at any point in the approval process, the entire workflow must start over.
If the request cannot be approved and does need to be sent back to the employee, click the More Actions dropdown menu and the Send Back to Employee option.
In the comments box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.
If the request can be approved, click Approve
or, if you need to insert an additional approver into the approval workflow, you can click the More Actions dropdown menu and select either Edit Approval Flow or Approve & Forward. More details on adding an approver to the request workflow are available in our training video on that topic.
Once you click Approve,
read the Approver Agreement that comes up to make certain you agree to it. As long as you do agree, click the Accept & Continue button. Your part in the approval process is now complete.