

Workflow - Business Liaisons &
Department Heads:
Approving Card Requests

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.

1) New Card

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,

- 1) New Card
- 2) Close/Cancel Card
- 3) Limit Increase/Decrease

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 screenshot displays the SAP Concur interface for a request titled "Britt McLaughlin PCARD". At the top, there is a navigation bar with "SAP Concur" and "Approvals" dropdown. Below this, there are tabs for "Approvals Home", "Requests", and "Reports". The breadcrumb trail shows "Home / Approvals / Requests / Britt McLaughlin PCARD". A pink alert banner at the top indicates "Alerts: 1". The main header for the request includes the name "Britt McLaughlin PCARD", a status "Britt Test | Pending Business Liaison Approval", and a "Request ID: 33MY". There are "More Actions" and "Approve" buttons. Below the header, there are dropdowns for "Request Details" and "Attachments", with a yellow arrow pointing to the "Attachments" dropdown. The "EXPECTED EXPENSES" section contains buttons for "Add", "Edit", "Delete", and "Allocate". A table below lists the expenses with columns for "Alerts", "Expense type", "Details", "Date", "Amount", and "Requested". The table contains one entry: "1) New Card" with a date of "12/07/2023" and an amount of "\$0.00".



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.

SAP Concur 


SAP Concur  Approvals 

Approvals Home [Requests](#) Reports

Home / Approvals / Requests / Britt McLaughlin PCARD

 Alerts: 1 


Britt McLaughlin PCARD [More Actions](#) [Approve](#)

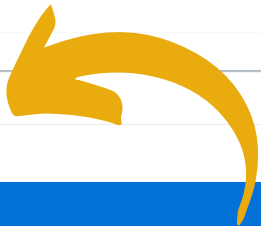
 Britt Test | Pending Business Liaison Approval | Request ID: 33MY

[Request Details](#) [Attachments](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)


<input type="checkbox"/>	Alerts $\downarrow\uparrow$	Expense type $\downarrow\uparrow$	Details $\downarrow\uparrow$	Date $\downarrow\uparrow$	Amount $\downarrow\uparrow$	Requested $\downarrow\uparrow$
<input type="checkbox"/>		1) New Card		12/07/2023		\$0.00



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

Home / Approvals / Requests / Britt McLaughlin PCARD / 1) New Card

Alerts: 1 

 Missing required fields: Department Name (displayed on card).

1) New Card \$0.00

Cancel **Save**

12/07/2023

Card Holder First Name

Brittny

Card Holder Last Name


McLaughlin

Department Name (displayed on card).

University Card Product Type

3) One Card-goods, services and travel

Monthly Card Limit Amount

Non-standard Limit Amount Request 


\$

Comment

0/2000

opens the details window

Alerts: 1 

 Missing required fields: Department Name (displayed on card).


1) New Card \$0.00

Cancel **Save**

Card Holder First Name

Brittny

Card Holder Last Name


McLaughlin 

Department Name (displayed on card).

University Card Product Type

3) One Card-goods, services and travel

Monthly Card Limit Amount

Non-standard Limit Amount Request 


\$

Comment

0/2000

where you can see the type of card requested,

Alerts: 1 

 Missing required fields: Department Name (displayed on card).

1) New Card \$0.00

Cancel [Save](#)

12/07/2023

Card Holder First Name

Brittny

Card Holder Last Name


McLaughlin

Department Name (displayed on card).

University Card Product Type

Monthly Card Limit Amount

3) \$50,000-Ghost Card Level 1

Non-standard Limit Amount Request 

\$


Comment

0/2000




and whether the limit requested is the standard limit


Alerts: 1 

 Missing required fields: Department Name (displayed on card).


  **1) New Card \$0.00**
12/07/2023

Cancel **Save**

Card Holder First Name Brittny	Card Holder Last Name McLaughlin
Department Name (displayed on card)	University Card Product Type
Monthly Card Limit Amount	Non-standard Limit Amount  \$ 100,000.00
Comment 0/2000	



or a nonstandard limit.

SAP Concur 


Department Name (displayed on card) *

Monthly Card Limit Amount * **None Selected**

- None Selected
- 1) \$3,000-Vehicle
- 2) \$10,000-Purchase, Travel, One Card
- 3) \$50,000-Ghost Card Level 1
- 4) \$100,000-Ghost Card Level 2

University Card Product Type **1) Purchasing Card-goods and services (non-travel)**

Non-standard Limit Amount Request ? \$



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.

SAP Concur Approvals

Approvals Home Requests Reports

Home / Approvals / Requests / Britt McLaughlin PCARD / 1) New Card

Alerts: 1

Missing required fields: Department Name (displayed on card).

1) New Card \$0.00 12/07/2023

Card Holder First Name: Brittny

Card Holder Last Name: McLaughlin

Department Name (displayed on card):

University Card Product Type: 3) One Card-goods, services and travel

Monthly Card Limit Amount: 3) \$50,000-Ghost Card Level 1

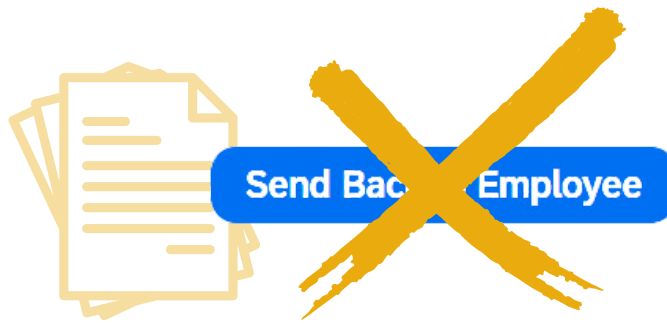
Non-standard Limit Amount Request: \$ 100,000.00

Comment: 0/2000

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.

The screenshot displays the SAP Concur interface for a request titled "Britt McLaughlin PCARD". At the top, the SAP Concur logo and "Approvals" menu are visible. Below the header, there are navigation tabs for "Approvals Home", "Requests", and "Reports". A breadcrumb trail shows "Home / Approvals / Requests / Britt McLaughlin PCARD". A pink alert bar indicates "Alerts: 1". The main content area shows the request details: "Britt Test | Pending Business Liaison Approval | Request ID: 33MY". There are links for "Request Details" and "Attachments". Below this is a section titled "EXPECTED EXPENSES" with buttons for "Add", "Edit", "Delete", and "Allocate". On the right side, there are two buttons: "More Actions" and "Approve". The "More Actions" dropdown menu is open, showing three options: "Edit Approval Flow", "Approve & Forward", and "Send Back to Employee". A yellow arrow points from the top right towards the "More Actions" button, and the "Send Back to Employee" option is circled in yellow.

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.


The screenshot displays the SAP Concur interface for managing approvals. The top navigation bar is blue with the SAP Concur logo. Below it, a grey sidebar contains navigation options: 'Approvals Home', 'Requests' (highlighted), and 'Reports'. The main content area is titled 'Britt McLaughlin PCARD' and shows a 'Pending Business Liaison Approval' status. A 'Reason for Sending Back the Request*' text box is highlighted with a yellow arrow, indicating where to enter a comment. Below the text box are 'Cancel' and 'Send Back' buttons.

In the comments box, explain why the request is being sent back so the employee understands what needs to be changed or happen next.

 Alerts: 1

Britt McLaughlin PCARD

[More Actions ▾](#) [Approve](#)

 Britt Test | Pending Business Liaison Approval | Request ID: 33MY

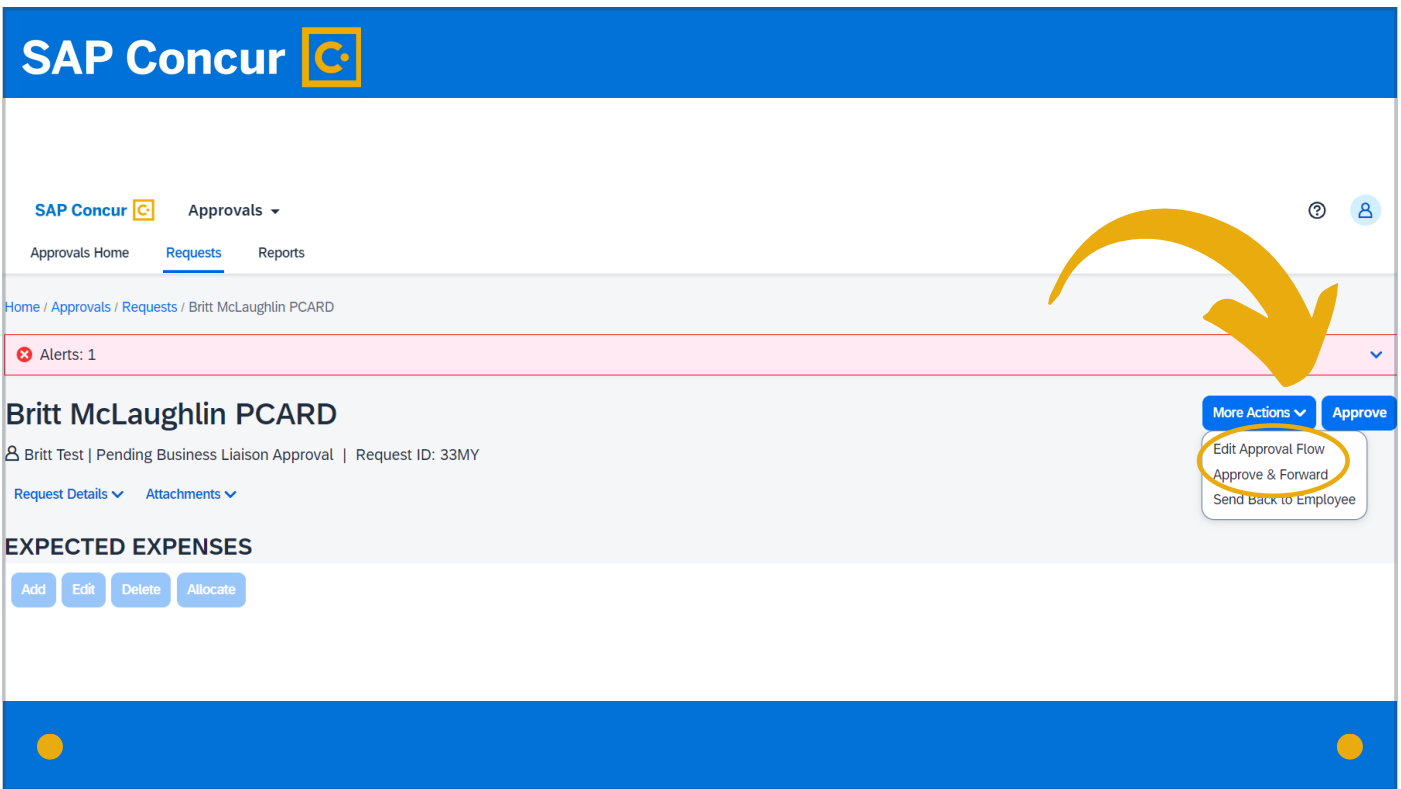
[Request Details ▾](#) [Attachments ▾](#)

EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>		1) New Card		12/07/2023		

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.

 Alerts: 1

Britt McLaughlin PCARD


[More Actions ▾](#) [Approve](#)

 Britt Test | Pending Business Liaison Approval | Request ID: 33MY

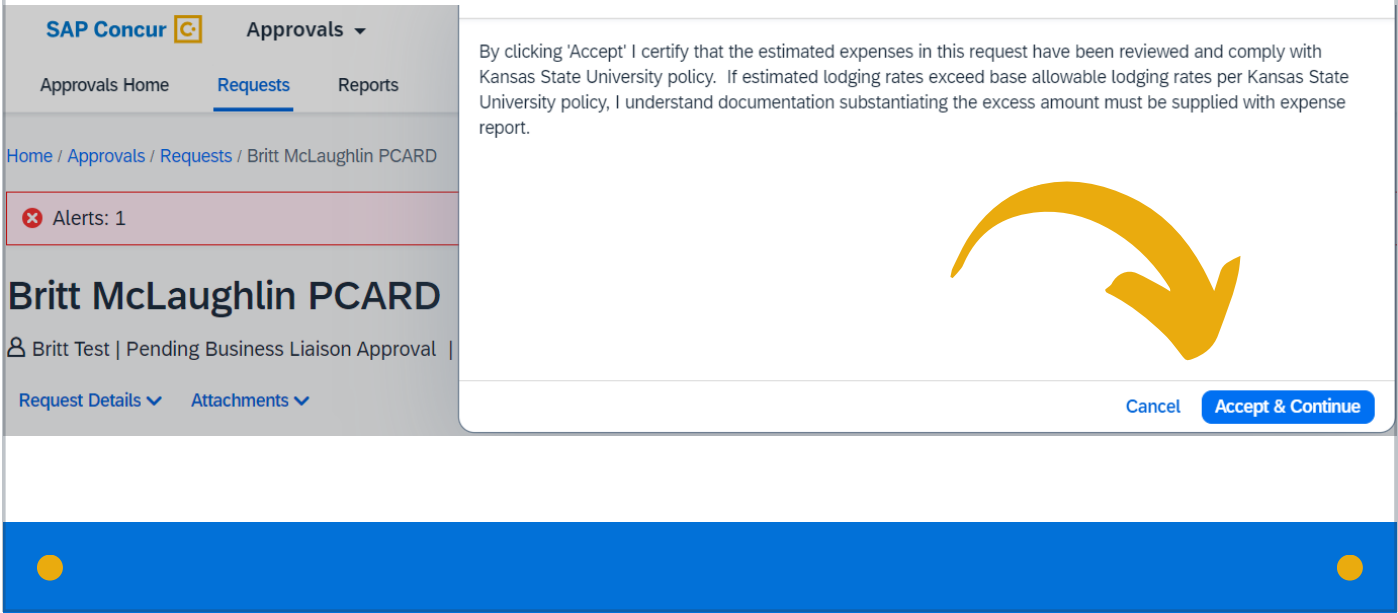
[Request Details ▾](#) [Attachments ▾](#)


EXPECTED EXPENSES

[Add](#) [Edit](#) [Delete](#) [Allocate](#)

<input type="checkbox"/>	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓↑	Amount↓↑	Requested↓↑
<input type="checkbox"/>		1) New Card		12/07/2023		

Once you click Approve,




SAP Concur  Approvals ▾

Approvals Home **Requests** Reports

Home / Approvals / Requests / Britt McLaughlin PCARD

Alerts: 1

Britt McLaughlin PCARD

 Britt Test | Pending Business Liaison Approval |

Request Details ▾ Attachments ▾

By clicking 'Accept' I certify that the estimated expenses in this request have been reviewed and comply with Kansas State University policy. If estimated lodging rates exceed base allowable lodging rates per Kansas State University policy, I understand documentation substantiating the excess amount must be supplied with expense report.

Cancel **Accept & Continue**

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.